# MONITOR ISM™ Director V4.3
# User's Guide

VEREX

# Contents


Using this Guide ..... vi

**Welcome ..... 1**

Introduction to Security Management ..... 2
Entering an Area & Disarming the System ..... 9
Welcome to MONITOR ISM™ Director ..... 10
Start-up and Logging In ..... 10
Exiting, Logging Off, or Changing Operators ..... 12
The Desktop ..... 14
System Management Primer ..... 16

**Running Reports, and Monitoring System Activity ..... 19**

Time-and-Attendance Reporting ..... 20
Required-Attendance Time-Periods ..... 24
Reporting on System & Personnel Activity ..... 26
Reporting on Previous Guard-Tours ..... 30
Reporting on User Access Authorities (by Area, Door, or Floor) ..... 32
Reporting on Users, System/Device Settings, etc. ..... 34
Reporting on Operator Audits or Panel Communications Logs ..... 36
Working with the Report Viewer ..... 38
Monitoring System Activity ..... 39
Visually Verifying Users (Photo-Verification) ..... 44
Setting up This Feature ..... 46

**Checking Status and Controlling Items ..... 47**

Maps and Video (Visual Monitoring & Status/Control) ..... 48
Status and Control Using Visual Director ..... 48
Camera Status/Control and Adjustments ..... 56
Introduction, Video Toolbar ..... 56
Controlling a Pan/Tilt/Zoom Camera ..... 57
Checking Camera/PTZ Connection Status ..... 58
Setting the Maximum Camera-Image Size ..... 59
Adjusting Camera Quality for your Connection/Bandwidth ..... 60
Initial Set Up of: Views, Maps, Cameras ..... 62
Checking Status & Controlling Items ..... 70
Introduction to Status & Control ..... 70
Using the Status Toolbar ..... 72
Set the Panel Date/Time, Reset APB for Users, or Clear a Global Lockout ..... 74
Checking the Status of Panels (Equipment) ..... 80
Checking the Status of Modules ..... 82
Checking the Status of a Suite Security System ..... 84
Checking Status or Controlling Items by Area ..... 86
Area Users (Activity, User Count, and APB-Reset) ..... 89
Checking User In/Out Status ..... 92
Checking Status or Controlling Individual Doors ..... 94
Checking Status or Controlling Elevators ..... 96
Checking Status or Controlling Floors ..... 98
Checking Status or Bypassing Input Points (Sensors) ..... 100
Checking Status or Controlling Outputs (Electronically switched Devices) ..... 102
Guard-Tours: Monitoring ..... 104
Guard Tours: Initial Set Up ..... 108



© 2004 CSG Security Inc. / Sécurité CSG Inc.

Panel Communications and Updates ..... 112
Panel Communications ..... 112
Activating Communications and Transferring Panel Settings ..... 114
Viewing the Status of Previous Communications Sessions ..... 118
Correcting Communication/Update Errors ..... 120
Setting Communications to AutoStart when an Operator Logs In (Single-PC Systems) ..... 122
**Administration and Maintenance ..... 125**
Operators (People Who Can Use This Software) ..... 126
Changing an Operator's Password ..... 128
Operator Permissions ..... 130
Scheduled Event Filtering for Operators ..... 134
Schedules for User-Access and Area Automation ..... 136
Holidays and Time-Change Dates ..... 140
Authorities for Users/Entrants ..... 142
Custom Information Categories for Users (Custom User Information) ..... 148
Users (Entrants / Panel Users) ..... 150
The Photo-Badging Option ..... 154
Fall-Back Users (Can Enter During Comms Failure) ..... 158
System Maintenance Tasks ..... 160
Password and Personal ID Number (PIN) Issues ..... 160
Large Systems--Checking for Software vs. Panel Differences / Conflicts ..... 162
Client/Server Systems: Checking to See Who Else is Logged onto the Database ..... 163
Checking / Repairing the MONITOR ISM Director Database Tables ..... 164
Backing up or Restoring the Database ..... 166
Exporting or Importing Activity or Audit Logs (Archive) ..... 172
Removing old Activity or Audit Logs (Purge) ..... 174
Operating System Maintenance ..... 175

**System Configuration** ..... **177**
Working with Accounts and Folders (Multi-Account Systems) ..... 178
After a Multi-Server Login ..... 181
Advanced Sorting ..... 182
Users and Holidays Shared Across Multiple Accounts ..... 183
Introduction ..... 183
Phase 1: Account-Specific Data ..... 184
Phase 2: Shared Groups ..... 186
Phase 3: Shared Users and Holidays ..... 190
Phase 4: Assign Shared Items to Accounts ..... 192
Account-Wide Panel Settings (Feature-Set, Service PIN, etc.) ..... 194
Account Information: (technical settings) ..... 194
Event Responses for Acknowledging Alarms ..... 197
Alarm / Event Instructions ..... 198
Enabling Sounds (to be associated with event/alarm messages) ..... 200
Customizing How Events are Displayed (Event Priority) ..... 202
Panels, Panel Groups, and Connection Settings ..... 204
Panel Groups and Connection Settings ..... 204
System Panels and Displayed Item-Numbers ..... 208
System Settings for each Panel ..... 210
System Security Settings for a Panel ..... 210
Monitoring, Paging, & Remote Mgt. Settings ..... 212
System Card-Access Settings ..... 216
Equipment Settings (Pseudo / Internal Inputs) ..... 218
Blocking Certain Events from Being Monitored by the System ..... 218
Understanding Access-Controlled Areas ..... 220
Areas and Related Settings ..... 222
Expansion Modules ..... 228
Suite-Security Keypads and Related Settings ..... 232
Doors, Readers, and Related Settings ..... 236
Reader 1 & 2 Settings for a Door ..... 240
Defining a 'Required Attendance' Zone ..... 240
Elevators (Lifts) and Associated Readers ..... 244
Floors (Pertaining to Access-Controlled Elevators / Lifts) ..... 250
Input Points—Monitored Sensors ..... 252
Input Points—Pre-Defined Sensor Types ..... 256
Input Points—Custom Point Types ..... 257
Programmable Outputs (Signalling & Device-Switching) ..... 260
Output Points and Related Settings ..... 260
Event Types and Events: ..... 262
Output Action: ..... 263
Commands (when you right-click an item): ..... 263
Cadence (Getting the Output to Pulse On and Off) (≥V4.2): ..... 263
Multi-Condition Equations: ..... 263
Programmable Output Functions ..... 265

 © 2004 CSG Security Inc. / Sécurité CSG Inc. 

**Installation and Technical Reference ..... 271**
PC Issues and Software Installation ..... 272
Recommended Computer Specifications ..... 272
Serial Port Installation and Set Up ..... 274
Windows Settings Required ..... 275
Software Installation for a Fresh/New System ..... 276
Upgrading from an Earlier Version of Software ..... 278
If You Need to Transfer the Database to a Different PC ..... 280
DCOM Setup (Required for Client-Server MONITOR ISM Director Systems): ..... 282
Client/Server Start-up Issues ..... 284
Software Activation and Licensing ..... 286
Client Workstation Access and Permissions ..... 290
PC Client Access (Allowable Client List) ..... 290
Setting Up PC Client Permissions ..... 294
New Installation? Try the Wizard ! ..... 296
Panel Connection Overview ..... 297
IP Connectivity ..... 298
PC-to-Panel—Direct Connection ..... 299
Single-Panel, Close to the PC (RS-232 / Connection Kit) ..... 299
Multi-Panel, and/or far From the PC (RS-485 Adapter) ..... 299
Windows Direct-Cable-Connection Setup ..... 300
PC and Panels—Modem Connections ..... 301
PC Modem Installation or Connection ..... 301
Windows Modem Setup ..... 301
Physical Setup of Panel Modems ..... 302
Panel to Modem Connection: RS-232 ..... 304
Panels to Modem Connection: RS-485 (Multi-Panel) ..... 305
Serial Port / Modem Setup (Communications Software) ..... 306
Communication Pools for System Panels ..... 310
Setting Up a New System (Commissioning) ..... 312
Importing Settings from an Existing MONITOR ISM Director System Panel ..... 316

Customizing the MyTools Bar ..... 318
System Capacities ..... 320
Advanced Database Features ..... 325
Overview of Features ..... 325
SQL Server Support ..... 325
User-Logins (Needed for: Database Query, and SQL Server Support) ..... 326
Linking to the Database (Used for: Custom Query/Reporting; ERM Integration) ..... 328
Automated User-Import (Used for: ERM Integration) ..... 332
Manually Importing User-Data From a Text File ..... 334
System / Hardware Reference ..... 335
System Design Aspects (Topology) ..... 335
Alarm System Hardware ..... 336
Desktop Reference ..... 338
The Desktop ..... 338
The Menu ..... 340
The Toolbar ..... 343
The Monitoring Window and Status Bar ..... 345
The Tree Area (and 'right-click' menu) ..... 346
The MyTools List / Bar ..... 349
The Forms View (and 'right-click' menu) ..... 350
The Grid View (and 'right-click' menu) ..... 352
Other Desktop Choices ..... 354
Selecting Desktop Items to be Displayed ..... 354
Setting Accounts to Appear in the Tree (Multi-Account Systems) ..... 354
Listing Items Panel-by-Panel vs. in a Single List and Showing or Hiding Panel References in Forms ..... 354
On-Line Support & Product Information ..... 357
Technical Support Web-Site ..... 357
**Index ..... 358**


© 2004 CSG Security Inc. / Sécurité CSG Inc.

# Using this Guide

Each topic that pertains to a specific MONITOR ISM™ Director **screen** generally shows how to do things on the **left**, and what the available settings mean on the **right**. This may pertain to a single page, or sets of 'facing pages' as required for larger topics. A bold double-line marks the end of each 'How-To' section, and the 'selection-descriptions' for the present screen follow thereafter.

Use the table of contents (at the front), or the index (at the back) to find a desired topic. The table of contents shows the topics as they appear in each chapter, while the index lists topic keywords alphabetically.

**Tip:** The bottom of each right-hand page shows you which chapter you are presently 'in'. (These match the topic-buttons across the top of the on-line help.)

To find specific information within a topic, skim through the subheadings (on the left), or the selection-descriptions for the specific screen (on the right) to find what you're looking for.

**Tip:** Additional notes, and links to other applicable sections are provided throughout. You can typically avoid reading the note text unless you run into problems or otherwise feel that you need more information.

**On-Line Help Tip:** The on-line help is structured in the same basic format as this User's Guide, with topic buttons that match the chapters and navigation footers in this guide. As you refer to the User's Guide, you are already becoming familiar with the on-line help (and vice-versa).


### Copyrights and Trademarks

™ MONITOR ISM Director, G-Prox, and Netvision are trademarks of CSG Security Inc./ Sécurité CSG Inc.
™ Pentium is a trademark of Intel Corporation
™ ® Microsoft, Windows, Windows 2000, and Windows XP, are trademarks or registered trademarks of the Microsoft Corporation.

© Copyright 2004
CSG Security Inc./Sécurité CSG Inc.
All rights reserved.


### Disclaimer

All software, firmware, drawings, diagrams, specifications, catalogues, literature, manuals and other supplied materials shall constitute the proprietary information of the manufacturer. In the interests of ongoing improvement in quality and design, we reserve the right to change product specifications without prior notification.

**Attention:** Physical alteration of hardware components or removal of electrical devices may void warranties, and/or affect radio-frequency and electromagnetic emissions.


This document is not to be copied, de-compiled, or re-distributed in any form without prior written consent.

© Copyright 1995-2004
CSG Security Inc./Sécurité CSG Inc.

# Welcome

# Introduction to Security Management

## General Concepts and Features

### Seamlessly Integrated Security

The MONITOR ISM Director software provides a seamless integration between managing system security and controlling personnel access at the facility. This provides assurance that unauthorized access will be detected for immediate attention, while allowing authorized persons to enter at their designated doors and times without triggering an alarm.

### Feature-Rich Security

The monitoring of doors, windows, and areas within the facility can be uniquely customized to meet even the most stringent requirements for a wide array of applications and situations. The interweaving of characteristics for 'areas' and individual devices, in conjunction with authority assignments for groups of persons provides a feature-rich environment for monitoring activity, maintaining security, and managing personnel.

### Access Control (Door and Elevator Controllers)

In its simplest sense, access control is the management of **WHO** can go **WHERE** and **WHEN**. With the addition of door (and/or elevator) controller modules, user-access can be controlled throughout a facility as desired.

Persons authorized to enter the facility are (typically) given an access card or token, which will allow access only to specific doors at applicable times as per the person's assigned authority profile. Each reader may require entry of a PIN, and/or the presence of an assigned escort (escort mode) or any second valid user (dual custody) before the door will unlock. Alternatively, entry can be using a 4-10 digit number associated with each person. Note: For access cards to be supported in this case, the encoded card numbers must match this value.

Doors can also be set to unlock and re-lock or change operating characteristics automatically at desired times. Area characteristics can also be automated based on a desired schedule, and area(s) can be set to disarm automatically whenever specific persons are granted entry.

Elevator controllers provide an interface between a reader in an elevator cab (lift), and the floor 'call buttons'--allowing persons to access only the floors that have been assigned to them. Call buttons for specific floors can also be activated based on a schedule--allowing anyone to access these floors during specific days and times.

Visitors (and others) can: • Be given cards that expire on a specific date and time; • Be denied access unless accompanied by an escort.

### Readers Set to Enable or Disable Certain Types of Cards

Readers can be set to enable or disable specific types of cards (such as visitor cards, or all temporary cards, etc.). All other (valid) cards will be granted access as usual, while unauthorized cards (wrong area/time/door-class, etc.) will be denied access.

### Activity Monitoring and Signalling

Activity that occurs at each site can be viewed through the MONITOR ISM Director software, and can also be transmitted to a Central Monitoring Station. The MONITOR ISM Director monitoring window can be set to show activity by date & time only, or all 'unresolved' (and higher priority) events first. As well, the window can be set to show all activity, or only specific types of events (either during set times, or until each operator changes their selections).

Attributes for different types of events can be customized as desired (priority, sound, colour, etc.). As well, instructions can be set to display for operators in the process of acknowledging either certain types of alarms, or alarms from specific sensors (input points).

"**Output points**" can be set to signal virtually any event or combination of events occurring in the system.

The event log can be purged or archived to improve reporting speed. With the archive feature, messages can be re-imported when a report is needed on a date-range that is no longer retained in the primary database.

How sensors are monitored--and events signalled, is based on the settings for the specific device and its associated "area", in conjunction with the arming level that is presently in effect for each individual area.

Dial up panels (with dedicated modems) can be set to automatically dial-in and transfer alarms, or blocks of activity messages to the MONITOR ISM Director system. In other configurations, the alarms and events are transmitted when a connection is made with the specific panel(s)—either manually, or at scheduled times.

### Additional Security with Bad Card/PIN Monitoring

With MONITOR ISM Director ≥v4.20, the system can be set to monitor multiple occurrences of invalid cards and/or PINs, and can lock out individual cards--or all cards--based on a specific number occurring in a set period of time.

Tip: This pertains to invalid PINs being entered at an LCD keypad as well.

### Photo Verification and Related Features

Each operator can select door(s) to have the stored photo for entrants displayed each time someone gains access (or is denied entry) at any of the selected door(s). The last 1, 4, or 9 entrant's photos can be displayed. Similarly, each device on a map can be set to display a 'camera-view' (on the same map) whenever a certain type of event occurs at the device (Also See: "Maps and Live Video...", to follow). A "Grant Last User" command allows letting a 'denied' user in—once they have been visually verified in the 'camera-view'.

### Centrally Monitored Systems

Centrally-monitored systems are connected to a 24-hour ULC listed Monitoring Station for a quick response when needed. When the control panel detects an intrusion, fire, panic or other alarm, it automatically signals the Monitoring Station. Emergency Response Operators will notify the appropriate local authorities in the area. Where by-laws require, alarms will be verified before dispatch occurs.

A local alarm on your premises may not be enough to scare away some intruders, so most experts agree that a monitored system is a required deterrent. As well, only a centrally monitored system can provide this extra measure of protection in the event of fire and other emergencies.

Messages are transmitted to a monitoring station via the 'Bell 103' (300 baud) modem/dialler built into each main panel, and/or an IP connection (SIP Reporting), or high-security communications (HSC). (HSC is supported via Mark7 / DVACS service in Canada). HSC modules also support a **printer**. SIP Reporting is supported beginning with **V3.30** MONITOR ISM Director software and panel firmware.

### Photo Badging Feature (Optional)

With the optional photo-badging feature, personnel photos can be captured directly in the screen for each specific user, and then printed onto the card when desired (along with selected data). You can also design the layout of elements to be printed onto the cards--for all users, or have different designs for specific blocks of users.

For details on supported video-capture devices and card printers, refer to "For the Card Badging Option" under "PC Issues and Software Installation".

### System and Device Status & Control Features

The status of items can be viewed and controlled both by an authorized user at an alarm keypad, and by an operator using the MONITOR ISM Director software. Some examples include bypassing sensors, arming and disarming areas, and unlocking or re-locking doors, or changing the operating characteristics for doors (by 'area', or for individual doors). Actions can also be scheduled to occur automatically at desired times, or when a specific event occurs (such as when an area is disarmed, or when a fire alarm occurs, etc.).

Beginning with Director V4.20, you can: • Check the In/Out status of users in real-time (for connected panels); • Check each area for

'activity' and/or the number of users that are present; • Control output points directly (from a map, or through the "Control & Status" feature).

"**Command Points**" can also be set up--allowing a button or sensor to command a device (area, door, etc.) on any panel, or all panels associated with the account.

### Maps and Live Video (Visual Director)

Beginning with **V4.0**, MONITOR ISM Director includes a customizable visual interface for viewing live cameras, monitoring alarms, and controlling items. We call this "Visual Director".

A number of camera controls are also provided, allowing you to: • Aim or zoom PTZ cameras; • Check connection status; • Adjust image quality, etc.

Camera-viewing is supported through Netvision™ capture-stations.

### Guard Tours

The routes taken by Guards can be initially set up, and then monitored for a specific user (guard) at any time. Each 'tour' will consist of chosen access-controlled doors, plus additional guard tour stations (checkpoints) that my be key-switches, or other types of input points—along with the acceptable time for the guard to arrive at each location. Area arm/disarm commands can also be issued automatically as the guard moves through the designated route.

### Reporting

No security management system would be complete without the ability to generate reports. The MONITOR ISM Director software provides an extensive list of customizable reporting features, including: • Various Time and Attendance reports; • Guard-Tour reports; • Activity reporting (including **Who** went **Where** and **When**); • User-access reports showing persons who can access a specific area, door, or floor during certain days and times; • Reporting on expired or inactive cards; • Printouts of the users and configured settings for a specific account; • A record of changes made by operators (audit reports).

These reports can be viewed and/or printed, and many can be saved as a text file, or archived in a viewable format.

### Paging

The paging feature of MONITOR ISM Director allows the triggering of certain outputs (up to 12 separate outputs per panel) to automatically send a message to a numeric pager, letting the wearer know that a certain event has occurred (e.g., forced entry, communication failure, fire, etc.). The specific events to be notified though the pager can be customized as desired through the programmable outputs configuration.

### Special-Use Features

A number of features are provided for special applications, including:

- Visitors that Must be Escorted: Cards can be set as 'escort-required'. This allows tracking the movement of visitors, while ensuring they cannot access controlled areas without an escort.
- Readers set to Enable or Disable Cards: Readers can be set to enable or disable specific types of cards (such as visitor cards, or all temporary cards, etc.). All other (valid) cards will be granted access as usual, while unauthorized cards (wrong area/time/door-class, etc.) will be denied access.

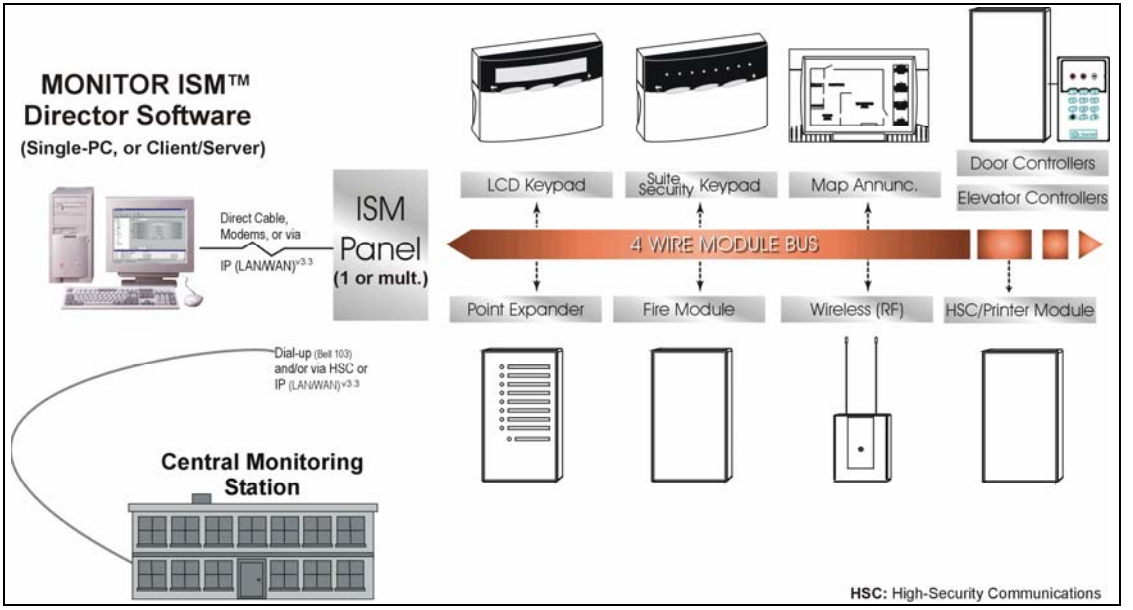
  Notes: Cards can either be disabled permanently, or can be allowed to be re-enabled later. Readers can be set to also unlock (or not) for cards being enabled or disabled. The auxiliary relay on the door controller can be triggered each time a card is enabled.
- Support for Suite-Security Keypads: Depending on software licensing, up to 60 suite-security keypads with LED display are supported per system panel, with 8 users supported per suite/facility.
- Multiple-Tenant Support: User authorities can be limited to working with a specific range of users and user authorities. This allows a multi-tenant facility to be managed through a single system.

- High-Security Areas and Vault Auto-Arming: Areas can be 'interlocked' so only one of them can be disarmed at a time. Vault/safe areas can be auto-armed when an attendant closes the door.
- Door Interlock: Doors can be set to disallow user access until up to 3 other specific doors have been closed (and re-locked) for a specific period of time. This allows limiting the number of persons who can enter in close proximity, and/or the speed at which persons can enter a specific area.
- Master Override: A security officer can be given the authority to enter doors that would normally deny access (i.e., due to cards being locked out, wrong time, etc.).

  Exceptions: This will not override 'wrong area or floor', card/PIN mode, 'strict APB', or door 'interlock' issues.

- Panic Token: Wireless (RF) panic tokens allow for locally or centrally-monitored personal protection.
- Wandering Patient Control: Patients can be equipped with 'smart' wristbands, allowing their presence to be detected as they approach exterior doors, or other locations that may be of concern. An alarm can be triggered, and the door can optionally lock as the patient approaches. Specific staff members can be given the authority to cancel the alarm by presenting their token at the specific door.
- Special Types of Input-Points: In addition to allowing input-point monitoring to be fully customized as desired, custom input-point types can be set up to support garage/extended-delay sensors, vault/safe inputs, arm/disarm keyswitches, Guard-Tour station inputs, and work-late buttons.

## System Components and Software



# System Software and Licensing

## The MONITOR ISM Director Software

The MONITOR ISM Director software provides a familiar Windows interface supporting these easy-to use features:

- An authorized technician (service user) can configure all aspects of the system for desired operation;
- Authorized administrative personnel have the ability to easily manage personnel, monitor activity, and perform typical maintenance tasks during the day-to-day operation of the system.
- Access to specific status and control features is provided to authorized operators with applicable user authorities, providing up-to-the-minute status and manual-control ability on an area-by-area basis, or for individual doors or sensors (input points).
- The software can be run on a single-PC, or across multiple PCs in a client-server arrangement.

MONITOR ISM Director is compatible with MONITOR ISM alarm systems—which in turn support many types of expansion modules and related hardware. The MONITOR ISM Director software (and the on-line help) run under Windows XP or 2000.

## Easy to Set Up (Wizards and Tabbed Screens)

Beginning with V4.0, the MONITOR ISM Director interface has been simplified to show only the settings that apply to your installation (per licensing, and account-type selections), and screens have been neatly divided into digestible topic-groupings. As well, the new **Tools** menu includes handy Wizards that provide a quick and easier way to set up a new system, and enable panel communications.

## Users and Holidays Shared Across Multiple Accounts

Beginning with MONITOR ISM Director V4.20, you can set up groups of users (and holidays) once, and then assign them to specific accounts (on the same server). This greatly reduces the amount of information required to set up users and holidays that are common to more than one account.

## Customizable Desktop

The MONITOR ISM Director interface can be set as desired by each individual operator. This includes whether they prefer the MyTools bar, or the Tree window, plus the sizing of the desktop sections, and other settings. (The MyTools bar can also be totally customized as to the items it contains, what each item is called, and the order (sequence) of the items.)

As well, the desktop will show only the features and items that are available to each specific operator (as per their assigned permissions).

## Multi-Language Support

The MONITOR ISM Director software supports multiple languages including: English, French, Spanish, Dutch, Russian, Simplified Chinese, and Traditional Chinese.

Operators and users can then be set as to their preferred language—allowing operator screens, on-line help, and/or LCD-keypad screens to appear in the appropriate language for the person who is presently logged in. Note: LCD keypads support English, French, Spanish, and Dutch.

## Operator and PC Permissions

Operators can be given permission to "view only", or "view or edit" items (on an item-by-item basis). For a client-server MONITOR ISM Director system, the individual features available at each client PC can also be restricted if desired. (To be available, items must be allowed for the operator AND for the PC.)

## Sortable Account List for Managing Many Accounts

To greatly simplify finding a desired account, a sortable account list is provided. The account list can be sorted on various items including the account name, the contact person, and various aspects of the site address. As well, you can log into up to 6 server PCs at a time, to allow viewing and selecting accounts across multiple servers--without having to log out in-between.

## Advanced Database Features

MONITOR ISM Director provides a number of advanced database features:

• Database Query: Allows you (or other software) to link to the Director database to perform custom reporting tasks; • Automated User Import: Allows the Director software to be interfaced with a personnel management system (Also called: "**E**nterprise **R**esource **M**anagement"); • SQL Server Support: Allows your company's IT department take charge of the database under SQL Server.

Note: These features are optional and/or depend on your software licensing.

## Software Licensing and Activation Key

System capacities and types of expansion / application modules supported depends on the software version and licensing, which is managed through the small 'activation key' provided with the software.

Activation Key: The MONITOR ISM Director software uses a small 'activation key' to manage software licensing and optional features. This device must be plugged onto the PC that contains the software database (≥**V4:** USB connector; ≤**V3.3.2:** Parallel/printer port; **V3.3.3:** Either).

**Note:** Director software ≥**V4 will not start up** if the USB key is missing.

**Software/Feature Activation:** Refer to "Software Activation and Licensing" to enable your software and related capacities.

Some of the capacities that follow also require additional panel memory to be installed. System upgrades may involve a combination of upgrading software, hardware, and/or licensing (refer to the instructions provided with the upgrade kit).

## Software Versions and Basic Capacities

| License => | PRIME | ENTERPRISE | ENTERPRISE ELITE |
|---|---|---|---|
| Users | 1,000 | 10,000 | 64000 |
| Doors | 16 | 1920 | 1920 |
| Graphical User Interface | 1 | 8 | 8 |
| Communication Clients | 1 | 3 | 3 |
| Panel | 1 | 60 | 60 |
| Accounts | 1 | 10 | 100 |
| Visual Director | × | ✓ | ✓ |
| Photo-badging | × | Optional | ✓ |
| Client/Server Deployment | × | ✓ | ✓ |
| Database Views and SQL Server Support | × | × | ✓ |
| ERM Capability | × | × | "Advance Features option" |

Notes and Exceptions: • Client/Server operation also allows multi-server login; • Adding panels allows for more areas, sensors, doors, etc.; • Elevator (lift) capacity is shared with the door capacity--max. 32 total (per panel); • Floor capacity is the same per panel or account (124), and can be for one building, or shared across multiple buildings; • Suite capacity is per panel, and is reduced by 5 for each (other type of) hardware module present. For more information, refer to "System Capacities" (near the end of this guide).

## Checking or Updating Your System Capacities

To check your present system capacities, open the **Help** menu, and select **[About]**. Then, click **[License Info]**, and scroll within the small window to view your capacities.

(Any three-letter acronyms typically pertain to different types of door-controller modules, and other peripherals.) For full details on maximum system capacities, refer to "System Capacities".

---

To update your system capacities, you'll need to run the license manager utility. For details, refer to "Software Activation and Licensing".

To make use of your available capacities, the panel "Feature-Set" must be set appropriately. For details, refer to "Account-Wide Panel Settings".

**Note:** To enable your new capacities, additional panel memory may need to be installed. For details, refer to the applicable table under "System Capacities".

**Related Topic:** "System / Hardware Reference" (near the back of this guide).

# Entering an Area & Disarming the System

| Area Setting | Reader/Door Mode | | | |
|---|---|---|---|---|
| | **Locked & Card Only** | **Locked & Card+PIN** | **Locked & Card or UID/PIN** | **Locked & UID/PIN Only** |
| **Disarmed (Off)** | Present card, open the door | Present card, enter PIN open the door | Present card or enter user no., enter PIN open the door | Enter UID+PIN (or PIN only), open the door |
| **Armed & 'Auto Disarm on Valid Token'** | Present card, open the door | Present card, enter PIN open the door | Present card or enter user no., enter PIN open the door | Enter UID+PIN (or PIN only), open the door |
| **Armed & 'PIN-Only' or 'ID+PIN'** | Present card, open the door. Then log into panel and disarm it. | Present card, enter PIN open door. Then log into the panel & disarm it. | Present card or enter user no., enter PIN open door. Then log into the panel & disarm it. | Enter UID+PIN (or PIN only), open the door. Then log into panel and disarm it. |
| **Armed & Dual Custody** | Present card, open the door. Then login with two user PINs (or ID+PIN), & disarm area. | Present card, enter PIN open door. Then login with two user PINs (or ID+PIN), & disarm area. | Present card or enter user no., enter PIN open door. Then login with two user PINs (or ID+PIN), & disarm area. | Enter UID+PIN (or PIN only), open the door. Then login with two user PINs (or ID+PIN), & disarm area. |

If the door is unlocked, access is not controlled (simply open the door to enter the area). Conversely, if the door is locked, and all cards are presently 'locked out', users will be unable to enter.

Card Number: As an alternative to the user ID number (UID), and/or access cards, the system can be set for entry and login using the card number instead (4-10 digits).

Visitors that must be Escorted: Persons with a card set as "Visitor (Escort-Required)" must be escorted at each controlled reader (valid escort or regular cardholder--depending on the system settings).

To enter at a controlled door and disarm the area, an entry delay must be in effect. As well, only the users with authority to both enter the door at this time AND disarm the area will be granted entry.

The 'ID + PIN' or 'PIN Only' login requirement is determined by the 'Feature-Set' selection for the account.

Dual Custody (and Escort mode) is supported at individual readers as well.

**Using an Arming Station:** Additional features and entry options are provided through an arming station. These units are essentially a proximity reader with keypad, plus additional status indicators and features. For details on using an arming station, please refer to the MONITOR ISM (panel/keypad) User's Guide.

**Readers set to Enable or Disable Cards:** Some readers may be set to enable or disable specific types of cards (such as visitor cards, or all temporary cards, etc.)--with or without an associated door being unlocked at this time. All other (valid) cards will be granted access as usual.

Note: Cards can either be disabled permanently, or allowed to be re-enabled later.

**To Enter using a Door-Opener Button:** Use your access card and/or PIN to unlock the door (and activate the button). Then, simply press and release the door-opener button. Once inside the area, 'log' in at an LCD keypad, and disarm the area if required (i.e., if NOT set for "Auto-Disarm on Valid Token").

**If You are Being Forced to Enter:** With Card+PIN mode in effect, you can trigger a 'Duress' alarm by reversing the last 2-digits of your personal ID number (PIN). This can also be done when 'logging' into an LCD keypad.

**To Exit Using an RTE (REX) Button:** Simply press and briefly hold the request-to-exit button.

**If you Hold the Door Open:** If the door is held open for 'too long', a 'Door Held Open' message will be logged.

A person holding a door open, or indicating that they are being forced to enter may also trigger an alarm (depending on the monitoring settings for the specific door).

# Welcome to MONITOR ISM™ Director

## Start-up and Logging In

### Starting the MONITOR ISM Director Software

Select **Start**, **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director**, and wait for the start-up screen to appear.

Activation Key: The MONITOR ISM Director software uses a small 'activation key' to manage software licensing and optional features. This device must be plugged onto the PC that contains the software database (≥**V4:** USB connector; ≤**V3.3.2:** Parallel/printer port; **V3.3.3:** Either).

**Note:** Director software ≥**V4 will not start up** if the USB key is missing.

Client/Server Systems: Take care to ensure that the MONITOR ISM Director software is NOT already running before attempting to start it. Troubleshooting Tip: If the desktop is acting strangely, you may have two copies of the software running (and you've run out of memory).

"Cannot Open Database for Photo-badging": If you see this, (re)install the Microsoft DAO software from the ISM Director CD (d:\ISM Director Setup\DAO**setup.exe**).

### Logging In (Single-PC)

To gain access to your assigned items and features, you must first perform a 'Login': Select **Login** from the toolbar, and then enter your name and password, pressing **Tab** in between. Then, press **Enter**, or click **Login**.

If asked whether you want the "Communication Application" started or not, select **Yes** (typically).

Panel communications are required to:

- Update the monitoring window (live/real-time);
- Perform status & control tasks;
- Monitor guard-tours;
- Update panel(s) with changes.

Any previously active communications sessions (set to "stay connected") will attempt to reconnect automatically, once communications services are running.

### Logging In (Client/Server)

Select **Login** from the toolbar, and then enter your name and password, pressing **Tab** in between. (Ensure the "Server Location" is set as well, if present.) Then, press **Enter**, or click **Login**.

If a "Cannot Connect to Server" screen appears, check that you have not mistyped the "Server Location".

Note: The Director-server PC and software must be running (this is the PC that includes "...Director-Server.exe", and typically contains the database as well. For additional things to check, refer to "Client/Server Start-up Issues" (near the back of this guide).

If you just upgraded for client/server (server location missing on login screen): You may need to login once, shut down the software (incl. the communications or server module), then start the software and login again.

### On-Line Help Language

For versions of MONITOR ISM Director that include multi-language help files, the on-line help will normally come up in the language associated with your operator settings. You can also select a different language-version if desired (for this work-session).

Selecting a Different Help Language: Open the **Help** menu, select **Language**, and then select from the available choices.

### The Auto-Lockout Feature

If you do not use your keyboard for a specific period of time, the software will automatically go into 'lockout' mode to protect against an unauthorized person viewing or changing items. (For details, refer to the **[Lockout]** description).

To set the period of time before the keyboard lockout will occur (when you are logged in), refer to the section on "Operators".

- **Name:** A valid operator's name.
- **Password:** The operator's assigned password.

Default Operator Name & Password:
**Operator**, **1234**

The default login name and password take effect only until changed by a system administrator. To protect against unauthorized access to the software, the default password should be changed right away.

If your login name and password are no longer supported after upgrading from an earlier software revision, refer to "Upgrading from an Earlier Version of Software", paying special attention to converting your previous database.

- **Server Location:** In a multi-PC (client-server) installation, this allows you to identify the MONITOR ISM Director server. Select (or type in) the server "PC name" (or its network "IP address").

Director-Server PC: This is the PC that includes "**...Director-Server.exe**", and typically contains the database as well.

**Multi-Server Login:** You can select up to 6 servers for simultaneous login. This allows listing and selecting accounts from any of the server PCs without having to log out in between. (All servers you are logged into appear under **[Server]** in the 'tree'.) Related: "Working with Accounts and Folders"
Tip: Use semicolons (;) to separate multiple server names, or click **[...]**.

- **[...]:** Opens a small screen to allow selecting multiple servers. (The login will apply to all server PCs shown in this screen.) For each server, type or select the PC name (or IP address) at the bottom of the screen, and click **[Add]**. You can also **[Delete]** a selected server, or **[Replace]** it after typing a new name.

To login at the server PC itself, use the PC name (**not** the IP address).

---

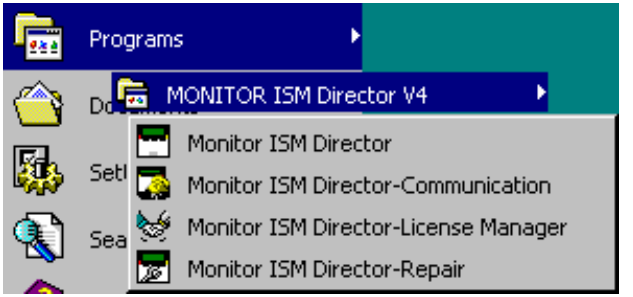
- **[Login]:** If the entered name and password are valid, the operator will be provided access to the items and features as assigned in their operator permissions.

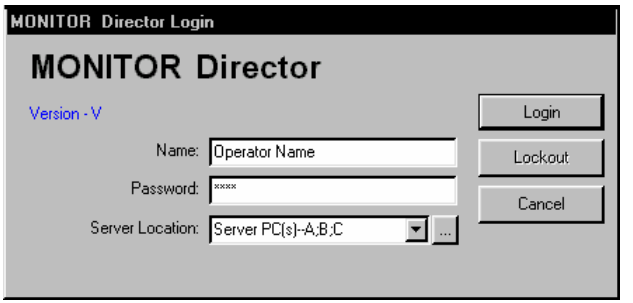
Server Connection Status: A small screen will show you the connection progress while a connection is made with your selected server(s).

- **[Lockout]:** This shuts down the software except for the status toolbar. (**Tip:** If the same operator logs back in, the software will also remember what account they were 'in'.)

The status toolbar requires that the software be connected with the applicable panels. For details on the status toolbar, or on establishing panel communications, refer to "Checking Status and Controlling Items".

- **[Cancel]:** Aborts the login request.




## (Single-PC, set to Auto-Start/Stop Communications)

- **[Yes]:** Auto-starts the panel communications software.
- **[No]:** Continues to log you in without starting the panel communications software.

**Tip:** To turn this prompt on or off (single-PC installations), refer to "Setting Communications to AutoStart When an Operator Logs In".

In all systems, you call connect with desired panel(s) manually, when necessary. This is described in each topic that requires panel communications.

# Exiting, Logging Off, or Changing Operators

## Shutting Down the MONITOR ISM Director Software

To shut down the MONITOR ISM Director software, click the **X** in the extreme upper-right corner of the MONITOR ISM Director screen (or open the **File** menu, and select **Exit**).

**Tip:** If you changed any desktop settings, and would like to retain them, be sure to click the check-box provided.

Then, select "**Yes**" on the confirmation screen.

If asked if you wish to shut down communications as well (single-PC systems), select **Yes** or **No**, as desired.

**Attention:** Shutting down communications while a panel update is in progress is NOT recommended, as this can leave panel database(s) in an unknown state.

Panel communications are required to:

- Update the monitoring window (live/real-time);
- Perform status & control tasks;
- Monitor guard-tours;
- Update panel(s) with changes.

Any active communications sessions (set to "stay connected") will attempt to reconnect automatically, the next time communications services are started.

The RPC Server is Unavailable: This message appears if the Director-Server application had been shut down previously (before the Director software).

## Logout or Lockout

To 'log' off, simply select **Logout** on the toolbar (or open the **File** menu, and select **Logout**).

**Tip:** If you changed any desktop settings, and would like to retain them, be sure to click the check-box provided.

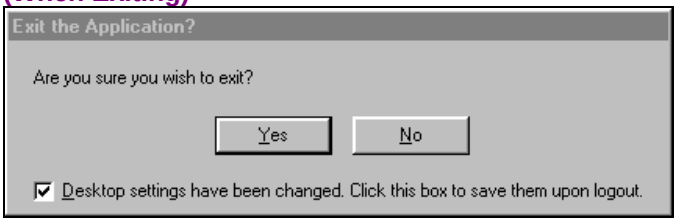
Then, select **Yes** to 'logout', or **No** to put the software in 'Lockout' mode. (See the 'Logout / Lockout' screen descriptions for details.)

To protect against unauthorized access to the MONITOR ISM Director software, it is always a good idea to use the logout (or lockout) feature before leaving your workstation. (For a related topic, see "The Auto-Lockout Feature", previous.)

## Changing Operators

Changing operators is simply a matter of one operator logging out, and the second operator logging in. (For details, see previous / above.)

## (When Exiting)

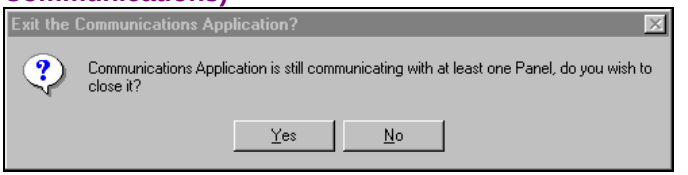



- **[Yes]**: Logs the present operator out, and shuts down the MONITOR ISM Director software.
- **[No]:** Aborts the exit request.

  If you have changed any desktop settings, a check-box will be provided to let you save your settings.

---

## (Single-PC, set to Auto-Start/Stop Communications)




- **[Yes]:** Shuts down panel communications services.

  This is NOT recommended while a panel update is in progress , as this can leave panel database(s) in an unknown state.
- **[No]:** Continues to shut down the software (or log you out) as requested, while leaving the panel communications software running.

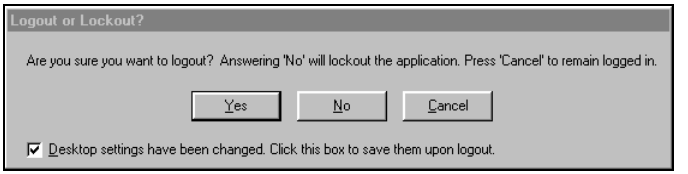
  If you have changed any desktop settings, a check-box will be provided to let you save your settings.

**Tip:** To turn the 'auto-start/stop communications' feature on or off (single-PC installations), refer to "Setting Communications to AutoStart When an Operator Logs In".

In all systems, you call connect with desired panel(s) manually, when necessary. This is described in each topic that requires panel communications.

---

## Logout / Lockout




- **[Yes]** (Logout)**:** Logs the present operator out, shutting down access to the MONITOR ISM Director software. (Until the next valid operator performs a 'login'.)
- **[No]** (Lockout)**:** This shuts down the desktop except for the status toolbar (and login button). (**Tip:** If the same operator logs back in, the software will also remember what account they were 'in'.)

  The status toolbar requires that the software be connected with the applicable panels. For details on using the status toolbar, or on establishing panel communications, refer to "Checking Status and Controlling Items"
- **[Cancel]:** Aborts the logout request, leaving the present operator logged in.

  If you have changed any desktop settings, a check-box will be provided to let you save your settings.

(For a related topic, see "The Auto-Lockout Feature", previous.)

# The Desktop

**Welcome:** This section contains a quick summary of the desktop components, and how you can change the look of your desktop.
For a detailed reference to the menu, toolbars, etc., refer to "Desktop Reference" (near the back of this guide).

## Your 'Window' to the System

The desktop is your interface to the MONITOR ISM Director software, providing a familiar Windows 'look and feel', with access to all features and items assigned to you as a MONITOR ISM Director operator.

The MONITOR ISM Director interface can be set as desired by each individual operator. This includes whether they prefer the MyTools bar, or the Tree window, plus the sizing of the desktop sections, and other settings.

## Selecting Desktop Items to be Displayed

The **[Tree]**, **[MyTools]** and **[Events]** buttons on the toolbar allow viewing or hiding different aspects of the desktop (try it!).

Your MyTools Bar: You can customize the look and content of the MyTools bar to your own preferences. For details, refer to "Customizing the MyTools Bar".

Account-Folders: For systems with single-account licensing, only one account will appear in the tree. In larger systems, **[Account Folders]** will be shown in the tree for operators with multi-account permissions (or that have the authority to edit account folders).

## Saving Your Desktop Settings

After changing an aspect of the desktop (the sizing, Forms/Grid mode, and/or which aspects are to be displayed, you can save your changes so the desktop appears in the same format the next time you login. To save your changes, open the **View** menu, select **Desktop Settings**, and then **Save**.

**Tip:** You will also be asked if you want to save your changes whenever you logout or exit from the software.

## Navigating the Desktop

Many screens are divided into 'tabs' of related settings. (Start with the 'Standard' tab, and look in any additional tabs that are of interest to you.) Some screens also include the familiar windows ‘scroll-bars’ whenever an item is too large to fit on-screen.

## Changing the Size of the Desktop

To resize the entire desktop, click and drag the bottom right corner to the desired position. (If the screen is presently 'maximized', you'll first need to double-click the blue title-bar, or click the middle button in the upper right corner of the screen.)

To ‘maximize’ the desktop, double-click the blue title-bar, or click the middle button in the upper right corner of the screen.

## Changing Proportions of Desktop Areas

To change the proportion of the desktop, move the mouse to the edge of a screen area (such as between the 'tree' and forms/grid area), and watch for the cursor to change shape. Then, click-and-drag the edge of the window to a new location.

**Tip:** You can also **maximize** the form/grid area, or the monitoring window (i.e., cause it to fill the entire screen) by double-clicking the title-bar for the specific window **twice**. (Also see "Resetting...", to follow.)

## Changing the Position of Desktop Items

Each portion of the desktop can be repositioned, and/or viewed on its own. This is especially useful on a multi-monitor PC, allowing an item such as the monitoring window to be viewed separately.

To relocate an item, 'drag-and-drop' the item by its title-bar, while watching for the greyed box indicating the new position.

To view an item 'full-screen' (such as the monitoring window), double-click its title-bar twice. To access the main desktop screen again, double-click the title-bar once again.

## Resetting the Desktop

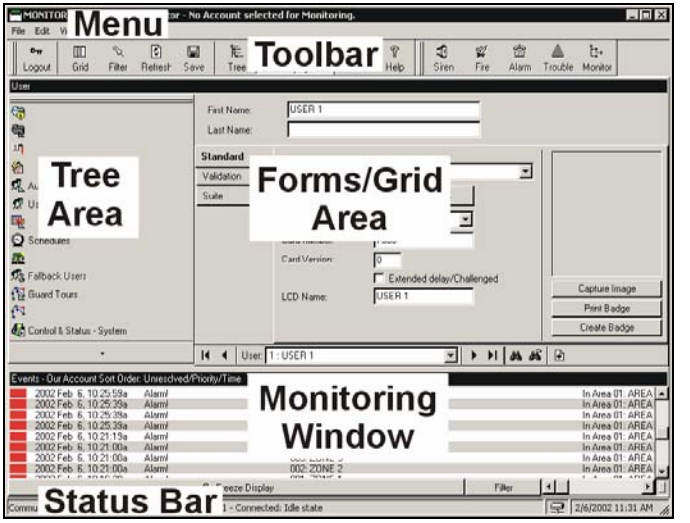
After moving and resizing areas of the screen, you may wish to reset the desktop to either your last saved settings, or to the initial factory default layout.

Last Saved Settings: Click **Reset** on the toolbar (or open the **View** menu, and select **Desktop Settings**, and **Reset**).

Factory-Default Layout: Open the **View** menu, and select **Desktop Settings**, and **Default**).

**Tip:** If a window or portion of the desktop is presently "maximized" (fills the entire screen), you'll need to double-click its title-bar to access the menu or toolbar.

**Note:** If your desktop was accidentally **saved** with the monitoring window 'undocked' and hidden behind the main desktop, follow the preceding steps for "Factory Default Layout".




- **The Menu:** Provides access to some miscellaneous features of the MONITOR ISM Director software. **Tip:** The **Tools** menu provides access to Wizards that simplify setting up a new system, and/or enabling communications with a panel.
- **The Toolbar:** Provides access to some common tasks.
- **The 'Tree'** (optional)**:** This is an expandable/ collapsible outline that allows selecting an account, and provides access to most topics including system configuration, management, and status & control. Click **[Tree]** on the toolbar to view or hide the 'tree'.
- **The 'MyTools' Bar** (optional)**:** This is a customizable list of tasks/items that can be used as alternative to the 'tree'.
  Click **[MyTools]** on the toolbar to view or hide the MyTools list/bar.
  Tip: You can customize the look and content of the MyTools bar when you are logged in (View ⇨ MyTools ⇨ Customize). For details, refer to "Customizing the MyTools Bar".
  MyTools Doesn't Work: If you select **[ MyTools ]**, and only a small empty 'button' appears, this means no items are assigned to the 'MyTools' bar. See the previous tip to fix this.
- **The Forms/Grid Area:** This area shows details on your present topic (as selected from the tree or MyTools bar). This can be set for either a forms view (typical / data entry), or 'grid' format (experienced persons / viewing and sorting lists).
  (Use the Form / Grid button on the toolbar to switch views.)
- **The Monitoring Window** (optional)**:** This area shows recent events that have been received (for a selected account).
  Click **[Events]** on the toolbar to view or hide the monitoring window.
  Multi-Account Systems: With multiple accounts, the monitoring window shows the events for your present account. (Select **[Account Folders]** in the tree, then locate and double-click your desired account.)
  To set the account to be monitored by the status toolbar, click **[Monitor]** on the far-right end of the toolbar.
- **The Status Bar:** This area (at the extreme bottom of your desktop) shows whether or not you are connected with a selected account (i.e., associated panels), plus other communications-related status messages.

# System Management Primer

## System Management

The MONITOR ISM Director system provides the flexibility to perform administration tasks either locally, through a system keypad (with 2-line LCD display), or through a MONITOR ISM Director workstation (via direct-connect, modems, or IP ≥V3.3 ). Persons with access to a MONITOR ISM Director workstation will find this the best place to start to perform the day-to-day management of the system.

**Tip:** Each operator will be able to see and use the features and items as assigned to them through their operator permissions.

Note: In a multi-PC system (client-server operation), MONITOR ISM Director manages database changes from multiple operators. If operators at two different workstations try to make changes to the same item, the last/second person to finish will be informed that another operator has changed the item. (If this occurs, click **Refresh** on the toolbar, scan the new settings, and then perform any desired changes.)

## On a Typical Day

On typical day using the MONITOR ISM Director software, will likely perform some (or all) of these tasks:

- Log into the software to gain access to your available selections. For details, refer to "Welcome to MONITOR ISM Director".
- Deal with any alarms indicated on the status toolbar, or marked in red in the monitoring window. For details, refer to "Monitoring System Activity", "Maps and Video", and/or "Checking Status and Controlling Items".
- Run some reports on what occurred over the past few days. For details, refer to "Time-and-Attendance Reporting", or "Reporting on System & Personnel Activity".
- Check the status of a specific 'area' in the facility, and/or control a door in an area. For details, refer to "Maps and Video", and/or "Checking Status & Controlling Items".
- Enter (or change settings for) a visitor or new employee (and/or associated authorities). For details, refer to "Users (Entrants / Panel Users)", and/or "Authorities for Users/Entrants".
- Set up a holiday (or the dates to switch between standard-time and 'daylight-savings'. For details, refer to " Holidays and Time-Change Dates".

## Locating Topics on the MONITOR ISM Director Desktop

### Using the MyTools List / Bar

- All tasks assigned to you can be accessed through the MyTools list / bar.
- To open the MyTools bar, click **[MyTools]** on the toolbar.

The look and content of the MyTools bar can be customized to suit each specific operator. For details, refer to "Customizing the MyTools Bar" (in the reference topics).

### These Topics are Available after Clicking [Your Account] in the Tree:

(Multi-account systems: Select **[Account Folders]**, then double-click the account)

- "Control & Status" topics--including maps and cameras ("Visual Director") if ≥V4.0.
- Working with "Users" and their associated "Authorities".
- "Schedule" and "Holiday"-related topics.
- Setting up a "Guard Tour", or using the "Guard Tour Monitor".
- "Account Information" including the mailing address, event priorities and instructions, and account-wide panel settings.
- System "Configuration" topics (for setting up 'Areas', and all devices (doors, monitored sensors, etc.).

Multi-Panel Systems: With all "Control & Status" topics, and "Configuration" topics (including "Areas", panel/system settings, and readers/doors, monitored sensors, etc.), you have a choice between having topics shown in a single list, or on a panel-by-panel basis. For details, refer to "Other Desktop Choices" in the desktop reference.

### Other Portions of the Tree:

- **Management:** This section includes "Operators" and "Operator Permissions", plus system/database management tasks. For client-server systems, the list of authorized clients is also accessed here.
- **Communications:** This section contains tasks regarding starting or stopping panel communications, and viewing details on previous sessions. Setting up "Communications Pools" (part of the initial system set up) is also included here.
- **Reports:** This section allows running many different types of reports pertaining to personnel time-and-attendance, activity that has occurred, and guard-tours that have been run--in addition to printing or viewing details on the items that have been set up in the system.

### Selections that Require Panel Communications:

For the following items, you must first start a communications session with the panel(s). (Multi-account systems: First click **[Account Folders]** in the 'tree', and locate and double-click the account.

- Keeping the Monitoring window up-to-date (for real-time monitoring);
- Using the 'Status Toolbar' (Siren, Fire, Alarm, Trouble);
- "Control & Status" topics (under ***[Your Account]*** in the tree);
- Monitoring previous Guard-Tours (Guard Tour Monitor under ***[Your Account]*** in the tree);
- Updating panels with changes.

For details on setting up a panel communications session, refer to "Panel Communications and Updates".

To set the account to be monitored by the status toolbar, click **[Monitor]** on the right-hand end of the toolbar.

## Initial Set Up

For full details on the initial set up of a system, refer to "Setting Up a New System (Commissioning)".

**See Also / Related Topics:**

+ "New Installation? Try the Wizard!"
+ "Panel Connection Overview".

## "What can be Done from Where"

### Adjusting the 'Closing' Time (Work-late) for an Active Schedule

The 'closing' time for a schedule can be adjusted:

- By an authorized operator using the MONITOR ISM Director software.
- By an authorized user/entrant at a system LCD keypad;
- By an authorized user/entrant at an 'arming station' enhanced reader;
- By pressing a 'worklate' button (inside the controlled-access facility);

Work-late buttons are set up as custom input-point types.

### Arming / Disarming Areas

The arming and disarming of a system and/or individual areas can be:

- Linked to an Event--such as when an exit door closes (Area settings), or when an authorized person is granted access (Authority settings);
- Set to occur automatically at specific times (Schedules and Area settings);
- Performed through the MONITOR ISM Director software—by an authorized operator (through "Control & Status" or a map--"Visual Director");
- Performed by an authorized user/entrant at an 'arming station' enhanced reader;
- Performed locally through a system LCD keypad by an authorized user (similarly, an apartment/suite or facility can be armed and disarmed through a suite-security keypad).
- Performed using a custom "arm/disarm keyswitch" input-point.

### Cardholder Administration

The administration of users/cardholders can be done:

- Through this MONITOR ISM Director Software (via modems or direct-connect);
- Locally through a system keypad (with 2-line LCD display).

### System Configuration

System/panel configuration can be done:

- By an authorized operator (with "Configuration" permissions) through this MONITOR ISM Director Software;
- Locally through an alarm system's keypad module (by an authorized technician).

System configuration through the MONITOR ISM Director software is supported through a direct-cable-connection or a dial-up (modem) connection to associated panel(s). All system configuration requires knowledge of the 'Service PIN'.

Local user admin. (via keypad) is supported in all systems, while local system configuration is supported only in single panel systems set to "**Feature Set**" 1, 2, 3, or 4. **Exception:** Keypad programming is supported in all systems for any 'application' modules that require this due to custom settings stored only at the module itself (HSC/printer module, RF module, and Smart-PODs).

**See Also (Related Topics):**

+ Account Type, Feature-Set, and Panel Operating Mode: "Account-Wide Panel Settings".
+ Allowed Capacities: "Software Activation and Licensing".
+ Maximum Capacities: "System Capacities".
+ Programming through an LCD Keypad: Refer to your MONITOR ISM Commissioning Reference Guide.

## Avoiding False Alarms

No matter how full-featured, and reliable a security system is, a number of steps **must** be taken to absolutely minimize the likelihood of false alarms occurring. These include:

**1)** Ensuring the system's configuration accurately reflects the requirements at the site (regarding the working times and movement of personnel during a typical workweek, etc.).

**2)** Knowing how the police and fire departments handle false alarms, and ensuring appropriate procedures have been set up with the monitoring station. For example, identifying the types of alarms where an off-site security or maintenance person is to be called either first, or instead of the police.

**3)** Ensuring all authorized persons know "where they can go and when", and have received appropriate training on the system. For example, how to disarm the area, adjust the 'work late' time, and perform other basic tasks through an LCD keypad.

**Tip:** To greatly minimize false alarms pertaining to personnel entering an armed area, the system will:

- Allow persons to enter only if they have the authority to disarm the applicable area, **or**:
- Disarm the area automatically when the person is granted entry (optional / if set for this).

# Running Reports, and Monitoring System Activity

# Time-and-Attendance Reporting

## Time and Attendance Reports

Cardholder time and attendance reporting allows generating reports pertaining to the presence (roll-call), tardiness, number of hours at work, etc. for users pertaining to a specific account.

These reports are extrapolated from entry and exit (access granted) messages in the activity log, and compared against a selected "attendance-period" that defines when the users are supposed to be inside the facility.

**TechTip:** Reports pertaining to past events are based on the present event list, plus any archived data that has been re-imported using the archive feature.

See: "Exporting or Importing Activity or Audit Logs".

For accurate attendance reporting:

- All doors used to enter and exit the facility must have entry and exit readers.
- The site (account) must have a 'Required Attendance Zone' defined by setting the "Area" as "Outside" for all readers used to **exit** from this zone.

  For details, refer to "Reader 1 & 2 Settings for a Door".
- Persons must use their access card / token EVERY time they enter and exit the facility.

**Note:** Persons last reported as 'In', but with no card activity for 24 hours will be set as 'Out'.

Attendance reports can take a full minute or longer to appear--depending on the number of cards at the site, and the number of activity messages being scanned.

For better performance, be sure to select the smallest date-range that meets your requirements. Also, you can keep the activity log to a suitable size via regular use of the **Archive** and/or **Purge** features.

For details, refer to "Exporting or Importing Activity or Audit Logs", and "Removing old Activity or Audit Logs".

Areas set for Antipassback Checking: The "APB Auto-Reset" feature is generally **not** recommended where Time & Attendance reporting functions will be used.

For details on the 'Antipassback' feature, and the "APB Auto-Reset" selection, refer to the "Antipassback" settings in the "Area" configuration topic.

## Required-Attendance Time Periods

To allow time & attendance reporting, each site (account) must have required attendance time periods set up that specify the days and blocks of time that employees are supposed to be inside the facility.

For details, refer to "Required-Attendance Time Periods".

## Running a Time and Attendance Report

1) Select **Time and Attendance Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Time and Attendance**.
2) Multi-Account Systems: Select the desired account near the centre of the screen.
   **Tip:** This option appears only if you didn't already have an account 'open' in the tree.
3) Select the range of dates to be covered by the report ("From" and "To"), and the time to be used as the "Start of Day".
   **Tip:** See the item-descriptions for more info.
4) Select the desired type of report (see the "Report Type" description for details).
5) Select the "Attendance period" that specifies when persons are supposed to be in the facility.
   **Notes:** An attendance period is **not** required for "Arrival / Departure", "Roll-Call" or "In/Out Status" reports. If a suitable attendance-period is not listed, refer to "Required-Attendance Time Periods" to set one up now.
6) To limit the report to a specific authority, user, etc., click **[Search For]**, and select the desired criteria.
   **Tip:** To clear a selection, select it and use your **Backspace** or **Delete** key.
   **Tip:** You can scroll within the form to view additional items if necessary.
7) Select a report 'destination' (i.e., whether it is to be viewed, printed, or saved as a file).
   If you select "Archive" or a type of "File", click **[File...]**, set the location and filename as desired, and click **Save**.
8) Click **[Run]**, and respond to any additional screen(s) that appear (details to follow).

For details on viewing and printing displayed reports, refer to "**Working with the Report Viewer**".

### If Printing an Attendance Report

To print a report without viewing it first: Select the type of report and other criteria as usual, and select **Printer** as the destination. Then, select **Run**, and click **OK** when the 'Print' screen appears. **Tip:** To select a different printer click **Printer**, and make your selection from the 'Print Setup' screen that appears.

To view a report before printing: Select the type of report and other criteria as usual, and select '**Screen**' as the destination. Then, click **Run**.

For details on viewing and printing the displayed report, refer to "Working with the Report Viewer".

A sample screen and selection-descriptions appear on the following pages.

### If Exporting an Attendance Report as a File (Archive/Text File/Report Emulation File)

Select the type of report and other criteria as usual, and the desired file-type as the 'destination'. Then, click **[File...]**. In the next screen, set the location and filename as desired, and click **Save** when finished. Then click **Run**.

### Viewing/Printing a Previously Saved Attendance Report-Archive

Select **Time and Attendance Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Time and Attendance**. Then, click **[Load archived report]** at the bottom of the form (scroll down if necessary).

Multi-Account Systems: You do not have to select an account since that was done when the report was archived.

In the next screen, locate and select the desired archived report (**.raf**), and click **Open** (or simply double-click the file).

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

## Report Period

- **From** and **To** (date): The beginning and end date from the event log to be checked for cardholder activity. (Change the values manually, or click the arrow to access a pop-up calendar.)

  Note: Roll-call and In/Out status reports use the previous 48 hours as a date/time range (instead of the "From" and "To" settings).

- **Start of Day:** This setting allows shifts that span midnight to be handled properly. Leave this as 12:00 AM for all work shifts that begin and end on the same day. For a shift that spans midnight, select a time at some midpoint between the end of one shift and the beginning of the next one (perhaps 1:00 PM).

## Report Type

(and Strict Interval / Relaxed Interval)

- **Absentee:** Persons who were not present during some part of each specific time interval of the required-attendance period.

  Exception: With "Relaxed Interval", only persons absent for the whole day are listed (if two intervals, both will be reported the same).

- **Arrival/Departure:** The time of the first arrival and last departure for all persons present on each day covered by the report.

- **Early Departure:** Persons who left before the end of one or more time intervals of the required-attendance period.

  **Note:** With "Strict Interval", persons who leave during a required time-interval, and then return after-hours (on the same workday) are treated as early departures. Select "Relaxed Interval" to stop this.

- **Late Arrival:** Persons who arrived after the beginning of one or more time intervals of the required-attendance period.

  **Note:** With "Strict Interval", persons who arrive and leave beforehand (on the same workday) and then return during a required time interval are treated as late arrivals. Select "Relaxed Interval" to stop this.

- **Totalization:** The duration each person spent inside the facility on each day during the required-attendance times.

- **Roll Call:** All persons presently tracked as being inside the facility's required-attendance zone (see note);

- **In/Out Status:** A list of all users, showing whether they are presently tracked as being inside or outside of the facility's required-

attendance zone (see note).

**Tip:** Persons last reported as 'In', but with no card activity for 24 hours will be set as 'Out'.

Note: For details on setting up a 'Required Attendance Zone', refer to "Reader 1 & 2 Settings for a Door".

## Attendance Period

A time period (previously-defined) that specifies when persons are required to be inside the facility.

An attendance period is not required for "Arrival/Departure", "Roll-Call" or "In/Out Status" reports. To set up an attendance period, refer to "Required-Attendance Time Periods".

## [Search For] / [Clear Search]

- This displays or closes the centre of the screen, which contains selections for 'fine-tuning' the report to a specific person, or users with a certain authority-profile or other criteria.

To clear a selection: Select it and use your **Backspace** or **Delete** key.

Searching by Name: For reports that allow searching by user-name, you can enter the 1st **or** last name only, 1st **and** last name (separated with a space), or "LastName, 1stName". If searching for a first or last name, you can enter the first few characters plus an asterisk (e.g., nam*).

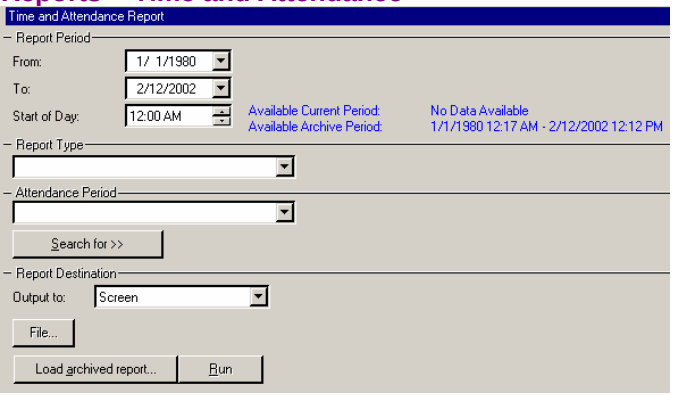
Custom User Field: This pertains to (optional) custom user information categories that can appear at the bottom of the 'User' screen.

Past Employees Deleted from the System: You can type a name rather than selecting it. This allows running a report on persons (and/or items) that have been recently deleted.

## Report Destination / Output To

- **Screen:** This has the report sent to the 'Report Viewer' window for viewing and/or printing desired pages;
- **Printer:** This allows selecting a printer and page-range, etc., and printing the report (without viewing it first);
- **Text File:** This has the report saved as a 'comma-delimited' text file for manipulation with another program. Allows you to change the location and/or filename if desired.
- **Report Emulation Text File:** This has the report saved as a formatted text file for viewing, printing, or editing with a text editor or word processor. Allows you to change the location and/or filename if desired.
- **Archive:** This has the report saved as a viewable archived report for viewing or printing at a later time. Allows you to change the location and/or filename if desired.

## Reports ⇨Time and Attendance




**(Multi-Account Systems:** Account Selection 'Tree')

- This area (near the centre of the screen) is where you select the account that your report pertains to. **Tip:** This option appears only if you didn't already have an account 'open' in the tree.

## (Remaining Buttons)

(You may need to scroll within the form and/or resize the window to view additional items. Click **Reset** on the toolbar to reset the desktop.)

- **[File...]:** This allows changing the location and file-name for a report being saved for future viewing, printing, etc. **Tip:** Use a different name each time to avoid overwriting previous reports.
- **[Load Archived Report]:** This allows browsing for, and opening a previously saved report-archive (not for use with text files). The report will appear in the report-viewer window for viewing and/or printing.

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

- **[Run]:** This runs the report based on your selected criteria. Additional screens will appear depending on your selections (such as the printer selection form, report viewer, etc.).

# Required-Attendance Time-Periods

## Attendance Periods

Attendance periods are weekly blocks of time that allow time & attendance reports to 'know' when users are supposed to be in the facility.

Schedules for cardholder access must **span** a larger period of time than the applicable attendance period--to let people enter the facility before their shift begins, and leave after it ends.

## Adding (Setting up) an Attendance Period

Select **Attendance Period** from your MyTools bar, **or** click **[Reports]** in the 'tree', open the **Time and Attendance** branch, and select **Attendance Period**.

Multi-Account Systems: Select the desired account near the centre of the screen. **Tip:** This option appears only if you didn't already have an account 'open' in the tree.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (bottom of the form). Note: Grid view does not apply to this screen.

The attendance period is shown graphically, for Sunday through Saturday. Add a new time-interval by right-clicking a specific day, and selecting **Create New Time Interval**.

Then, drag the interval and/or its end-points to the desired location. **Tip:** Copying, pasting, and deleting is also allowed when you right-click a specific time-interval.

Repeat this process until the desired times are set up for all days in the attendance period. (You can use up to 6 unique time intervals throughout each schedule.)

Now refer to the selection-descriptions for this screen for additional information.

**Tip:** You can copy all settings for an attendance period, and paste them into another one: In the 1st one, right-click near the bottom of the form, and select **Copy**. Then, select a blank/new attendance period from the list, right-click near the bottom of the form, and select **Paste**. After 'pasting', change the name and any settings as desired. **Note:** 'Copy' and 'Paste' are also available from the **Edit** menu.

## Viewing or Changing Settings for a Required-Attendance Period

Select **Attendance Period** from your MyTools bar, **or** click **[Reports]** in the 'tree', open the **Time and Attendance** branch, and select **Attendance Period**.

Multi-Account Systems: Select the desired account near the centre of the screen.

Now, choose the desired attendance period from the list (bottom of the form), and refer to the selection-descriptions for this screen while viewing and/or changing settings as desired.

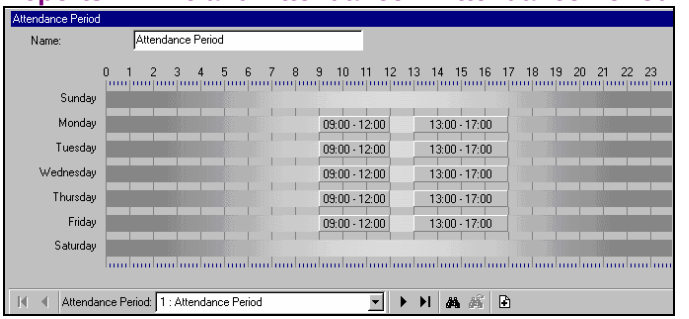
## Deleting an Attendance Period

Select **Attendance Period** from your MyTools bar, **or** click **[Reports]** in the 'tree', open the **Time and Attendance** branch, and select **Attendance Period**.

Multi-Account Systems: Select the desired account near the centre of the screen.

Now, choose the desired attendance period from the list (bottom of the form). Then, right-click a blank area near the bottom, and select **Delete**. When asked to confirm, choose **Yes**.

## Reports ⇨Time and Attendance ⇨Attendance Period




## Pick-Lists (bottom of the Form)

- **Attendance Period** (bottom of form)**:** This is where you select an attendance period to view or edit. This area shows a reference number assigned by the system, and the name of the attendance period, once defined;

## Top of the Form

- **Name:** A suitable name/description for the attendance period, or its intended use;

**(Multi-Account Systems: Account Selection 'Tree')**

- This area (near the centre of the screen) is where you select the account that your attendance-period pertains to. Tip: This option appears only if you didn't already have an account 'open' in the tree.

## On this Form (Intervals 🗀)

- **Days of the Week** (with Associated Time-Intervals): The days of the week showing the time intervals for each day. (To add an interval, right-click the specific day. To adjust an interval, drag the interval and/or its end-points to the desired position.)

  **Tips:** You can copy and paste (or delete) time intervals using the right-click menu. Up to 6 unique time-intervals can be used as desired throughout the weekdays in each attendance period.

Split Shift: Be sure to include an interval for after a meal break—assuming the break is not part of the 'required attendance' times.

Work Shift that Spans Midnight: In this case, each day will need two intervals for the times before and after midnight, plus any other required intervals (such as for after a meal break—assuming the break is not part of the 'required attendance' times).

# Reporting on System & Personnel Activity

## Activity Reports

Activity reporting allows viewing or printing a listing of various types of events that have occurred for a specific account. A date/time range can be specified, and the report can also be limited to a specific area, device, person, etc.

**TechTip:** Reports pertaining to past events are based on the present event list, plus any archived data that has been re-imported using the archive feature.

See: "Exporting or Importing Activity or Audit Logs".

As well, activity reports can be viewed and/or printed right away, saved for future reference, or exported for manipulation with another program.

For better performance, activity reports cover only the latest 5000 messages in the activity log. For even faster execution, keep the activity log to a suitable size via regular use of the **Archive** and/or **Purge** features.

See: "Exporting or Importing Activity or Audit Logs", and "Removing old Activity or Audit Logs".

## Running an Activity Report

1) Select **Activity Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Activity**.
2) Multi-Account Systems: Select the desired account near the centre of the screen.
   **Tip:** This option appears only if you didn't already have an account 'open' in the tree.
3) Select the date/time range to be covered by the report (under "From" and "To").
   **Tip:** See the item-descriptions if you need help.
4) Select the types of events to be included in the report (you must select at least one).
5) To limit the report to a specific person, area, door, etc., click **[Search For]**, and select the desired criteria.
   To clear an individual selection, select it and use your Backspace or Delete key. To reset/clear all selections, scroll down and click **[Reset]**.
   **Tip:** You can scroll within the form to view additional items if necessary.
6) Select a report 'destination' (i.e., whether it is to be viewed, printed, or saved as a file).
   If you select "Archive" or a type of "File", click **[File...]**, set the location and filename as desired, and click **Save**.
7) Click **[Run]**, and respond to any additional screen(s) that appear (details to follow).

For details on viewing and printing displayed reports, refer to "**Working with the Report Viewer**".

### If Printing an Activity Report

To print a report without viewing it first: Select the type of report and other criteria as usual, and select **Printer** as the destination. Then, select **Run**, and click **OK** when the 'Print' screen appears. **Tip:** To select a different printer click **Printer**, and make your selection from the 'Print Setup' screen that appears.

To view a report before printing: Select the type of report and other criteria as usual, and select '**Screen**' as the destination. Then, click **Run**.

For details on viewing and printing the displayed report, refer to "Working with the Report Viewer".

### If Exporting an Activity Report as a File (Archive/Text File/Report Emulation File)

Select the type of report and other criteria as usual, and the desired file-type as the 'destination'. Then, click **[File...]**. In the next screen, set the location and filename as desired, and click **Save** when finished. Then click **Run**.

### Viewing/Printing a Previously Saved Activity Report-Archive

Select **Activity Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Activity**. Then, click **[Load archived report]** at the bottom of the form (scroll down if necessary).

Multi-Account Systems: You do not have to select an account since that was done when the report was archived.

In the next screen, locate and select the desired archived report (**.raf**), and click **Open** (or simply double-click the file).

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

A sample screen and selection-descriptions appear on the following pages.

## Event Period

- **From** and **To** (date and time): The beginning and end date from the event log to be checked for cardholder activity.

  **Tip:** You can change the dates manually, or click the arrow to access a pop-up calendar. To set the times, click within the 'hours' or 'minutes', and use the up/down arrow keys.

## Event Type

- The various types of messages that can be included in the report (select the ones that you want included).

  **Note:** You must select at least one event-type. "**Toggle All**" allows selecting or de-selecting all event-types.

## [Search For] / [Clear Search]

- This displays or closes the centre of the screen, which contains selections for 'fine-tuning' the report to a specific person, area, door, etc.

  Custom User Field: This pertains to (optional) custom user information categories that can appear at the bottom of the 'User' screen.

  Show on Resolution: This lets you have the list include events depending on whether or not they have been 'resolved' (i.e., dealt-with). "All": This shows all events--including ones not associated with the comment/resolution feature.
  For details on resolving events, refer to "Dealing with Alarms (Comment / Resolve)" in the section on monitoring activity (previous).

  Show on Priority: This allows limiting the window to show only events of a desired priority value (or range).

  Show on Custom Filter: This allows limiting the window to show only events of a desired 'custom-filter' value (or range).

  **Also See:** To assign priorities or 'Custom Filter' values, refer to the configuration topic: "Customizing How Events are Displayed".

  **Tip:** To clear an individual selection, select it and use your Backspace or Delete key. To reset/clear all selections, click the **[Reset]** button at the bottom of the form (scroll down if this button is not visible).

  Past Employees Deleted from the System: You can type a name rather than selecting it. This allows running a report on persons (and/or items) that have been recently deleted.

## Report Destination / Output To

- **Screen:** This has the report sent to the 'Report Viewer' window for viewing and/or printing desired pages;

- **Printer:** This allows selecting a printer and page-range, etc., and printing the report (without viewing it first);
- **Text File:** This has the report saved as a 'comma-delimited' text file for manipulation with another program. Allows you to change the location and/or filename if desired.
- **Report Emulation Text File:** This has the report saved as a formatted text file for viewing, printing, or editing with a text editor or word processor. Allows you to change the location and/or filename if desired.
- **Archive:** This has the report saved as a viewable archived report for viewing or printing at a later time. Allows you to change the location and/or filename if desired.

## (Remaining Buttons)

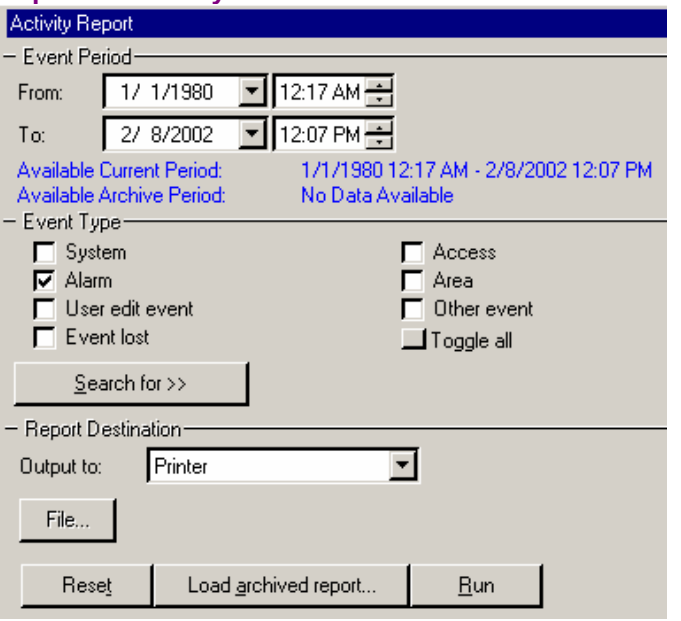
**Tip:** You can scroll within the form and/or resize the window to view additional items when necessary. (Click **Reset** on the toolbar to reset the desktop.)

- **[File...]:** This allows changing the location and file-name for a report being saved for future viewing, printing, etc. **Tip:** Use a different name each time to avoid overwriting previous reports.
- **[Reset]:** This provides a quick way to reset/clear the "Search for" criteria and other selections on the form.
- **[Load Archived Report]:** This allows browsing for, and opening a previously saved report-archive (not for use with text files). The report will appear in the report-viewer window for viewing and/or printing.

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

- **[Run]:** This runs the report based on your selected criteria. Additional screens will appear depending on your selections (such as the printer selection form, report viewer, etc.).

## Reports ⇨Activity




**(Multi-Account Systems:** Account Selection 'Tree')

- This area (near the centre of the screen) is where you select the account that your report pertains to. **Tip:** This option appears only if you didn't already have an account 'open' in the tree.

# Reporting on Previous Guard-Tours

## Guard Tour Reports

Guard tour reports allow viewing or printing a listing of events pertaining to previous guard tours for a specific account. A date/time range can be specified, and the report can also be limited to specific items such as guard tour alarms, or the guard arriving early or late.

**TechTip:** Reports pertaining to past events are based on the present event list, plus any archived data that has been re-imported using the archive feature.

See: "Exporting or Importing Activity or Audit Logs".

Active Guard Tours: For details on monitoring a guard-tour, refer to "Guard Tours".

As well, guard tour reports can be viewed and/or printed right away, saved for future reference, or exported for manipulation with another program.

For better performance, activity and guard-tour reports cover only the latest 5000 messages in the activity log. For even faster execution, keep the activity log to a suitable size via regular use of the **Archive** and/or **Purge** features.

See: "Exporting or Importing Activity or Audit Logs", and "Removing old Activity or Audit Logs"

## Running a Guard Tour Report

1) Select **Guard Tour Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Guard Tour**.
2) Multi-Account Systems: Select the desired account near the centre of the screen.
   **Tip:** This option appears only if you didn't already have an account 'open' in the tree.
3) Select the date/time range to be covered by the report (under "From" and "To").
   **Tip:** See the item-descriptions if you need help.
4) Select the types of events to be included in the report (you must select at least one).
5) Select a report 'destination' (i.e., whether it is to be viewed, printed, or saved as a file).
   If you select "Archive" or a type of "File", click **[File...]**, set the location and filename as desired, and click **Save**.
6) Click **[Run]**, and respond to any additional screen(s) that appear (details to follow).

For details on viewing and printing displayed reports, refer to "**Working with the Report Viewer**".

## If Printing a Guard Tour Report

To print a report without viewing it first: Select the type of report and other criteria as usual, and select **Printer** as the destination. Then, select **Run**, and click **OK** when the 'Print' screen appears. **Tip:** To select a different printer click **Printer**, and make your selection from the 'Print Setup' screen that appears.

To view a report before printing: Select the type of report and other criteria as usual, and select '**Screen**' as the destination. Then, click **Run**.

For details on viewing and printing the displayed report, refer to "Working with the Report Viewer".

## If Exporting a Guard Tour Report as a File (Archive/Text File/Report Emulation File)

Select the type of report and other criteria as usual, and the desired file-type as the 'destination'. Then, click **[File...]**. In the next screen, set the location and filename as desired, and click **Save** when finished. Then click **Run**.

## Viewing/Printing a Previously Saved Guard Tour Report-Archive

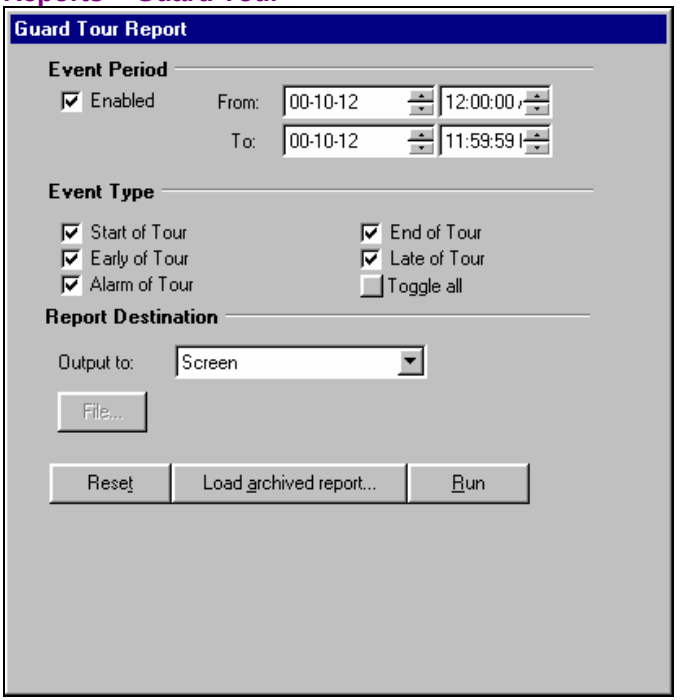
Select **Guard Tour Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Guard Tour**. Then, click **[Load archived report]** at the bottom of the form.

Multi-Account Systems: You do not have to select an account since that was done when the report was archived.

In the next screen, locate and select the desired archived report (**.raf**), and click **Open** (or simply double-click the file).

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

## Reports ⇨Guard Tour




### Event Period

- **From** and **To** (date and time): The beginning and end date from the event log to be checked for guard-tour events.

**Tip:** You can change the dates manually, or click the arrow to access a pop-up calendar. To set the times, click within the 'hours' or 'minutes', and use the up/down arrow keys.

### Event Type

- The various guard tour events to be included in the report (the guard arriving late, etc.). Select the ones that you want included).

**Note:** You must select at least one event-type. **"Toggle All"** allows selecting or de-selecting all event-types.

### Report Destination / Output To

- **Screen:** This has the report sent to the 'Report Viewer' window for viewing and/or printing desired pages;
- **Printer:** This allows selecting a printer and page-range, etc., and printing the report (without viewing it first);
- **Text File:** This has the report saved as a 'comma-delimited' text file for manipulation with another program. Allows you to change the location and/or filename if desired.
- **Report Emulation Text File:** This has the report saved as a formatted text file for viewing, printing, or editing with a text editor or word processor. Allows you to change the location and/or filename if desired.
- **Archive:** This has the report saved as a viewable archived report for viewing or printing at a later time. Allows you to change the location and/or filename if desired.

**(Multi-Account Systems: Account Selection 'Tree')**

- This area (near the centre of the screen) is where you select the account that your report pertains to. **Tip:** This option appears only if you didn't already have an account 'open' in the tree.

### (Remaining Buttons)

- **[File...]:** This allows changing the location and file-name for a report being saved for future viewing, printing, etc. **Tip:** Use a different name each time to avoid overwriting previous reports.
- **[Reset]:** This provides a quick way to reset/clear all selected items on the screen.
- **[Load Archived Report]:** This allows browsing for, and opening a previously saved report-archive (not for use with text files). The report will appear in the report-viewer window for viewing and/or printing.

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

- **[Run]:** This runs the report based on your selected criteria. Additional screens will appear depending on your selections (such as the printer selection form, report viewer, etc.).

# Reporting on User Access Authorities (by Area, Door, or Floor)

## User Access Reports

User-access reports provide a list of the persons with authority to access a specific area, door, or floor on specific weekdays and times. You can also list: • Cards that have expired; • Cards that will expire in the future (selectable date-range); • Cards that have not been used since a specific date.

Tip: This is a powerful report that checks more than schedules and area assignments. It also checks things like "Master Override", scheduled door unlockings, etc.

Note: This report pertains to users who are **intended** to have access based on system configuration. (It cannot allow for things such as manual door unlockings.)

User-access reports can be viewed and/or printed right away, saved for future reference, or exported for manipulation with another program.

## Running a User-Access Report

1) Select **User Access Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **User Access**.
2) Multi-Account Systems: Select the desired account near the centre of the screen.
   **Tip:** This option appears only if you didn't already have an account 'open' in the tree.
3) Refer to the selection-descriptions for this screen while setting up your report as desired.
4) Click **[Run]**, and respond to any additional screen(s) that appear (details to follow).

For details on viewing and printing displayed reports, refer to "**Working with the Report Viewer**".

## If Printing a User-Access Report

To print a report without viewing it first: Select the type of report and other criteria as usual, and select **Printer** as the destination. Then, select **Run**, and click **OK** when the 'Print' screen appears. **Tip:** To select a different printer click **Printer**, and make your selection from the 'Print Setup' screen that appears.

To view a report before printing: Select the type of report and other criteria as usual, and select '**Screen**' as the destination. Then, click **Run**.

For details on viewing and printing the displayed report, refer to "Working with the Report Viewer".

## If Exporting a Report as a File (Archive/Text File/Report Emulation File)

Select the type of report and other criteria as usual, and the desired file-type as the 'destination'. Then, click **[File...]**. In the next screen, set the location and filename as desired, and click **Save** when finished. Then click **Run**.

## Viewing/Printing a Previously Saved Report-Archive

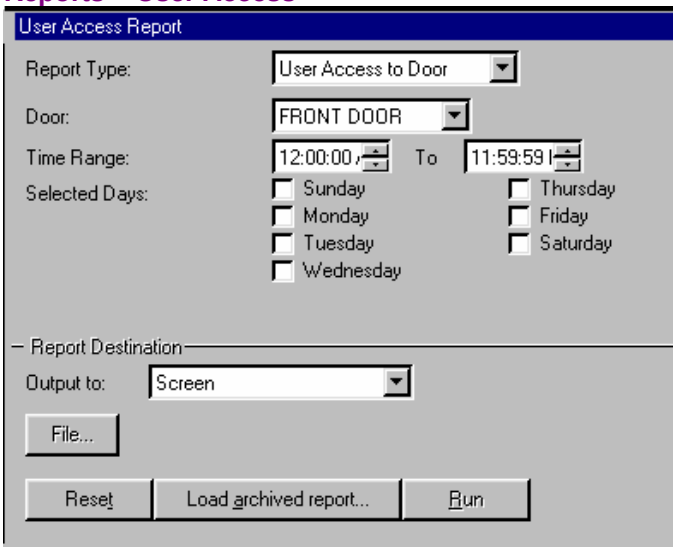
Select **User Access Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **User Access**. Then, click **[Load archived report]** at the bottom of the form (scroll down if necessary).

Multi-Account Systems: You do not have to select an account since that was done when the report was archived.

In the next screen, locate and select the desired archived report (**.raf**), and click **Open** (or simply double-click the file).

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

## Reports ⇨User Access




### Report Type

- Select whether your report is to show user-access by Door, Floor, or Area.

Expired Cards: This lists cards that are presently expired, or that will expire in the future (per your selections). **Tip:** You can change the date numerals manually, or click the arrows to access pop-up calendars.

Inactive Cards: This lists cards that have note been used since a selected date. **Tip:** You can change the date numerals manually, or click the arrow to access a pop-up calendar.

### Time Range

- Select the time of day to be examined for cardholder access (i.e., the starting time and end time).

Tip: To set the times, click within the 'hours' or 'minutes', and use the up/down arrow keys. **Note:** The report will include everyone with access during **any portion** of your selected time range.

### Selected Days

- Select the weekdays to be examined for cardholder access.

**Note:** You must select at least one weekday. **Note:** The report will include everyone with access on any of the days you select.

### Report Destination / Output To

- **Screen:** This has the report sent to the 'Report Viewer' window for viewing and/or printing desired pages;
- **Printer:** This allows selecting a printer and page-range, etc., and printing the report (without viewing it first);
- **Text File:** This has the report saved as a 'comma-delimited' text file for manipulation with another program. Allows you to change the location and/or filename if desired.
- **Report Emulation Text File:** This has the report saved as a formatted text file for viewing, printing, or editing with a text editor or word processor. Allows you to change the location and/or filename if desired.
- **Archive:** This has the report saved as a viewable archived report for viewing or printing at a later time. Allows you to change the location and/or filename if desired.

**(Multi-Account Systems:** Account Selection 'Tree')

- This area (near the centre of the screen) is where you select the account that your report pertains to. **Tip:** This option appears only if you didn't already have an account 'open' in the tree.

### (Remaining Buttons)

- **[File...]:** This allows changing the location and file-name for a report being saved for future viewing, printing, etc. **Tip:** Use a different name each time to avoid overwriting previous reports.
- **[Reset]:** This provides a quick way to reset/clear the "Search for" criteria and other selections on the form.
- **[Load Archived Report]:** This allows browsing for, and opening a previously saved report-archive (not for use with text files). The report will appear in the report-viewer window for viewing and/or printing.

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

- **[Run]:** This runs the report based on your selected criteria. Additional screens will appear depending on your selections (such as the printer selection form, report viewer, etc.).

# Reporting on Users, System/Device Settings, etc.

## Customizable Reports

The MONITOR ISM Director software allows viewing or printing a listing of programmed information in your system. This includes settings for the system, areas, devices, panel users, etc.

Related Topic: You can also link to the database and set up custom queries of nearly any scope and content. Details: Advanced Database Features

These reports show a list of your selected items, in a customizable format:

- Set the fields/settings to appear in the report, and the order of these 'columns';
- Include only the users/items that match specific criteria;
- Set the sort order for the listed users/items.

**Tip:** These reports can also be saved as a 'comma-delimited' text file for manipulation with another program.

## Running these Types of Reports

**1a)** To view or print a customizable list of users, select **User Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Users** .

**1b)** For a customizable list of other programmed items, select **Panel Configuration Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Panel Configuration**.

**2)** Multi-Account Systems: Select the desired account in the account selection 'tree' near the centre of the screen.
**Tip:** This option appears only if you didn't already have an account 'open' in the tree.

**3)** Panel Configuration Reports: Select the "Type" of report (e.g., list settings for areas, doors, schedules, etc.).

**4)** Select the columns of items to be included in the report ( ✓ ).
**Tip:** For more information, refer to "Columns" in the selection-descriptions.

**5)** Select a report 'destination' (i.e., whether the report is to be viewed, or printed without viewing it first).
**Tip:** If saving a report as a text file, click **[File...]**, set the location and filename as desired, and click **Save**.

**6)** Click **[Run]**, and respond to any additional screen(s) that appear (details to follow).

For details on viewing and printing displayed reports, refer to "**Working with the Report Viewer**".

## If Printing one of These Reports

To print a report without viewing it first: Select the type of report and other criteria as usual, and select **Printer** as the destination. Then, select **Run**, and click **OK** when the 'Print' screen appears. **Tip:** To select a different printer click **Printer**, and make your selection from the 'Print Setup' screen that appears.

To view a report before printing: Select the type of report and other criteria as usual, and select '**Screen**' as the destination. Then, click **Run**.

For details on viewing and printing the displayed report, refer to "Working with the Report Viewer".

## If Exporting one of these Reports as a Text File

Select "User", and set the 'destination' as "Text File". Then, click **[File...]**. In the next screen, set the location and filename as desired, and click **Save** when finished. Then click **Run**.

**Tip:** The report will be saved as a 'comma-delimited' text file that can be manipulated with another program as desired.

## Viewing/Printing a Previously Saved Report-Archive

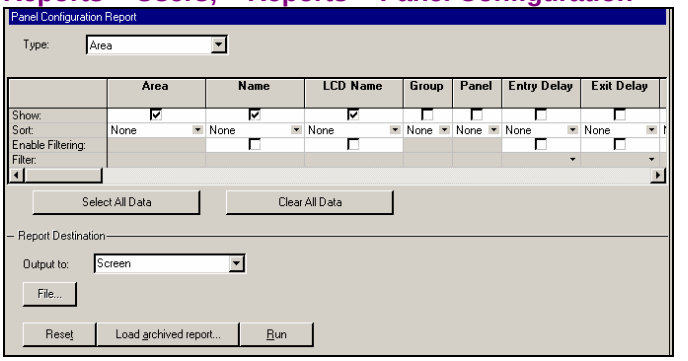
Select the desired type of report as described previously ("Users", or "Panel Configuration"). Then, click **[Load archived report]** at the bottom of the form.

Multi-Account Systems: You do not have to select an account since that was done when the report was archived.

In the next screen, locate and select the desired archived report (**.raf**), and click **Open** (or simply double-click the file).

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

## Reports ⇨Users;  Reports ⇨Panel Configuration




- **Type** (Panel Config. Reports only): The desired topic to be covered by the report (areas, doors, etc.).

  **Note:** Reports pertaining to "Areas" and physical devices (modules, doors, etc.) are available only for operators with the applicable 'Configuration' permissions.

- **(Columns)**: Data fields/settings to be included in the report.

  Tip: The "Group" column in panel config. reports pertains to the "Panel Group" (e.g., location) for the specific panel.

  Set the Column Order: To change the position of a column, click the column once to select it, and **then** click-and-drag it to the new location. **Tip:** You can use the horizontal scroll-bar to view additional columns.

  Select Desired Columns: Click the check-box for each column to appear in the report ( ✓ ). **Tip:** You will be notified if you selected more than can fit in the space available (de-select some if required).

  Setting the Sort-Order: To sort the report by any **one** value (such as last name), open the 'sort' box for the desired column (click the down arrow), and select the desired sort order (ascending or descending).

  Limiting to People/Items that match some Criteria: To limit the report to persons/items that match a specific value (authority, custom user category, etc.), open the 'filter' box for the desired column (click the down arrow), and select an item from the list. Tip: You can filter on multiple columns if desired.

- **[Select All Data]** and **[Clear All Data]**: These buttons allow selecting or deselecting all fields/columns for the report.

## Report Destination / Output To

- **Screen:** This has the report sent to the 'Report Viewer' window for viewing and/or printing desired pages;
- **Printer:** This allows selecting a printer and page-range, etc., and printing the report (without viewing it first).
- **Text File** (for User reports)**:** This has the report saved as a 'comma-delimited' text file for manipulation with another program. Allows you to change the location and/or filename if desired.

  Note: Any custom user categories (department, position, etc.) set as the "Memo" data type (multi-line edit) will be omitted.

**(Multi-Account Systems: Account Selection 'Tree')**

- This area (near the centre of the screen) is where you select the account that your report pertains to. **Tip:** This option appears only if you didn't already have an account 'open' in the tree.

## (Remaining Buttons)

- **[File...]:** This allows changing the location and file-name for a report being saved for future viewing, printing, etc. **Tip:** Use a different name each time to avoid overwriting previous reports.
- **[Reset]:** This provides a quick way to reset/clear all selected items on the screen.
- **[Load Archived Report]:** This allows browsing for, and opening a previously saved report-archive (not for use with text files). The report will appear in the report-viewer window for viewing and/or printing.
- **[Run]:** This runs the report based on your selected criteria. Additional screens will appear depending on your selections (such as the printer selection form, report viewer, etc.).

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

# Reporting on Operator Audits or Panel Communications Logs

### Audit Reports

Audit reporting allows viewing or printing a listing of changes made by operators, or records of panel communications sessions. A date/time range can be specified, and the report can also be limited to desired criteria.

**TechTip:** Reports pertaining to past events are based on the present event list, plus any archived data that has been re-imported using the archive feature.

See: "Exporting or Importing Activity or Audit Logs"

As well, audit reports can be viewed and/or printed right away, saved for future reference, or exported for manipulation with another program.

For better performance, be sure to select the smallest date-range that meets your requirements. Also, you can keep the audit log to a suitable size via regular use of the **Archive** and/or **Purge** features.

See: "Exporting or Importing Activity or Audit Logs", and "Removing old Activity or Audit Logs".

### Running an Audit Report

1) Select **Audit Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Audit Report**.
2) Select the date/time range to be covered by the report (under "From" and "To").
   **Tip:** See the item-descriptions if you need help.
3) Select the desired criteria for the report.
   (Refer to the details under "Search Criteria".)
4) Select a report 'destination' (i.e., whether it is to be viewed, printed, or saved as a file).
   If you select "Archive" or a type of "File", click **[File...]**, set the location and filename as desired, and click **Save**.
5) Click **[Run]**, and respond to any additional screen(s) that appear (details to follow).

For details on viewing and printing displayed reports, refer to "**Working with the Report Viewer**".

### If Printing an Audit Report

To print a report without viewing it first: Select the type of report and other criteria as usual, and select **Printer** as the destination. Then, select **Run**, and click **OK** when the 'Print' screen appears. **Tip:** To select a different printer click **Printer**, and make your selection from the 'Print Setup' screen that appears.

To view a report before printing: Select the type of report and other criteria as usual, and select '**Screen**' as the destination. Then, click **Run**.

For details on viewing and printing the displayed report, refer to "Working with the Report Viewer".

### If Exporting an Audit Report as a File (Archive/Text File/Report Emulation File)

Select the type of report and other criteria as usual, and the desired file-type as the 'destination'. Then, click **[File...]**. In the next screen, set the location and filename as desired, and click **Save** when finished. Then click **Run**.

### Viewing/Printing a Previously Saved Audit Report-Archive

Select **Audit Report** from your MyTools bar, **or** click **[Reports]** in the 'tree', and select **Audit Report**. Then, click **[Load archived report]** at the bottom of the form.

In the next screen, locate and select the desired archived report (**.raf**), and click **Open** (or simply double-click the file).

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

---

### Log Period

- **From** and **To** (date and time): The beginning and end date from the audit log to be scanned for the report.

  **Tip:** You can change the dates manually, or click the arrow to access a pop-up calendar. To set the times, click within the 'hours' or 'minutes', and use the up/down arrow keys.

  Client/Server Systems: Times are stored as GMT in the database, and adjusted for correct display in the time-zone at each specific workstation.

### Search Criteria

- **Log Type:** Select "**Operator**" for configuration changes made by operator(s), or "**Communication**" for panel update sessions.

- **Account:** Select a specific account, or "**All**" accounts.
- **Action:** This changes depending on the type of report:

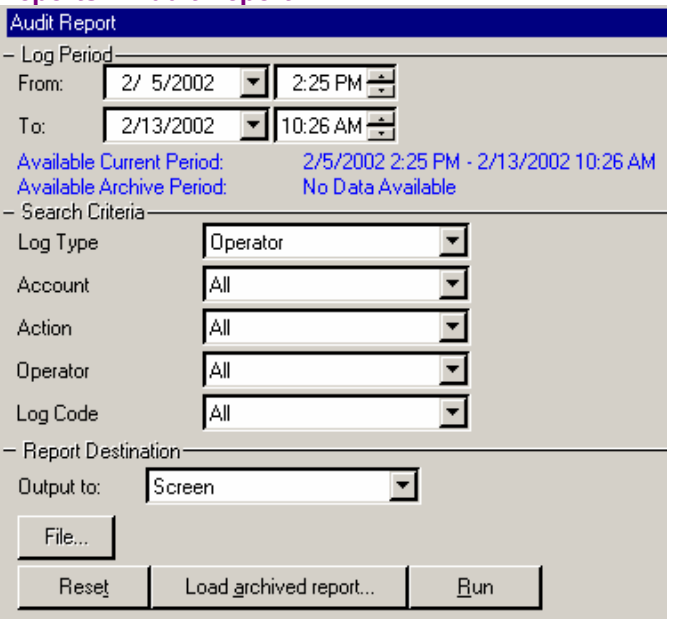
  For an Operator audit report: The type of action that was performed (add, delete, etc.). "**All**" is recommended here, unless you're looking for something more specific.

  For a Communications Log Report: The type of communications session (normal/sync , get from panel, or send to panel).
- **Operator** (operator audit report only)**:** Select a desired operator, or "**All**" for audits by any operator.
- **Topic** (operator audit report only)**:** This is the type of information that was changed. Select "**All**" for changes made to any topic.

## Report Destination / Output To

- **Screen:** This has the report sent to the 'Report Viewer' window for viewing and/or printing desired pages;
- **Printer:** This allows selecting a printer and page-range, etc., and printing the report (without viewing it first);
- **Text File:** This has the report saved as a 'comma-delimited' text file for manipulation with another program. Allows you to change the location and/or filename if desired.
- **Report Emulation Text File:** This has the report saved as a formatted text file for viewing, printing, or editing with a text editor or word processor. Allows you to change the location and/or filename if desired.
- **Archive:** This has the report saved as a viewable archived report for viewing or printing at a later time. Allows you to change the location and/or filename if desired.

## Reports ⇨Audit Report




**(Multi-Account Systems: Account Selection 'Tree')**

- The area (near the centre of the screen) is where you select the account that your report pertains to. **Tip:** This option appears only if you didn't already have an account 'open' in the tree.

## (Remaining Buttons)

- **[File...]:** This allows changing the location and file-name for a report being saved for future viewing, printing, etc. **Tip:** Use a different name each time to avoid overwriting previous reports.
- **[Reset]:** This provides a quick way to reset the search criteria (to "Operator" audit report, and find "All" audits).
- **[Load Archived Report]:** This allows browsing for, and opening a previously saved report-archive (not for use with text files). The report will appear in the report-viewer window for viewing and/or printing.

For details on viewing and printing displayed reports, refer to "Working with the Report Viewer".

- **[Run]:** This runs the report based on your selected criteria. Additional screens will appear depending on your selections (such as the printer selection form, report viewer, etc.).

# Working with the Report Viewer

## The Report Viewer

When a report is set to be viewed, it appears with a toolbar allowing:

- Viewing different pages of the report;
- Setting the portion of each page that will be visible at one time (zooming in or out);
- Selecting a printer, and/or setting the pages to be printed;
- Printing the report.

## Setting the Size / Visible Portion of a Report

To change the size/visible portion of a report:

- Select one of the pre-set magnification levels (page symbols), **or**;
- Enter a desired magnification in the "%" box, and press **Enter**.

## Viewing Different Pages

To view a different page:

- Use the 'browse' buttons to find a page (typical), or;
- Enter a desired page-number into the 'current page' box.

## Printing a Report

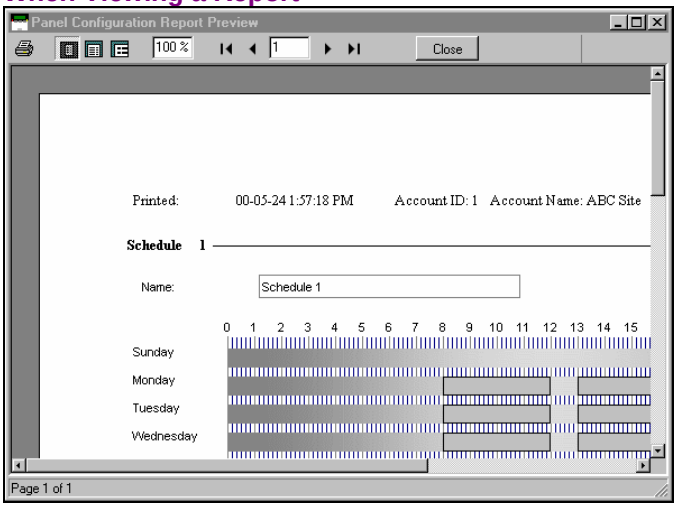
To print the report that is presently on-screen, click the print button (printer symbol). When the next screen appears, select your desired page-range, etc., and click **OK**. **Tip:** To select a different printer click **Printer**, and make your selection from the 'Print Setup' screen that appears.

MONITOR ISM Director automatically sets the preferred page orientation for each report (portrait or landscape). This setting should be left as-is.

## Closing a Displayed Report and Returning to the Main Screen

To close the report viewer window, and return to the main desktop, click **[Close]** on the report-viewer toolbar, or click the '**X**' in the top-right corner of the report viewer window.

## When Viewing a Report




## (Report Viewer Toolbar)

- **Print** (printer symbol): This allows selecting and/or setting up a printer, and printing either the whole report, or a specific range of pages.
- **Pre-set Magnifications (page symbols):** These selections allow viewing an entire page at a time, or the page width, or viewing each page actual-size (100% magnification);
- **Zoom (xx%):** This area shows the present magnification level for the displayed report, and allows entering a different value.
- **|< < > >|** (browse buttons): These buttons allow moving to the first, previous, next, or last page respectively.
- **Current Page (xx):** This area shows the page number that is presently displayed, and allows jumping to a different page by entering the page number directly.
- **[Close]:** This closes the report viewer, returning you to the MONITOR ISM Director desktop. (This is the same as clicking the **X** in the top-right corner of the screen.)

# Monitoring System Activity

## Alarm and Activity Monitoring

### Alarm and Activity Monitoring through the MONITOR ISM Director System

When the MONITOR ISM Director system is connected with specific panel(s), all events and alarms are transmitted for display in the monitoring window, allowing the tracking of guard tours, and to allow for various types of report generation.

Dial up panels with dedicated external modems (one panel per modem) can be set to automatically dial-in to the MONITOR ISM Director system to transmit alarms or blocks of activity messages. In other configurations, the alarms and events are transmitted when a connection is made with the specific panel(s)—either manually, or at scheduled times.

Real-time monitoring (immediate reporting) through MONITOR ISM Director requires that the software **remain** connected with the specific panel(s).

Multi-Account Systems: The monitoring window is activated for a specific account when you double-click the account (under **[Account Folders]** in the tree).

For details on activating a panel connection, and the "Stay Connected" setting, refer to "Panel Communications and Updates".

To set a dial-up panel to automatically transfer alarms or blocks of activity messages, refer to the configuration topic: "Monitoring, Paging, & Remote Mgt. Settings".

### Sites Monitored through a Central-Monitoring Station

Sites can additionally be monitored through a dedicated central-monitoring facility. In this case, you can set whether only the 'alarms' or all activity is to be transmitted—on an area-by-area basis. As well, individual sensors (input points) and monitored panel conditions (equipment / pseudo-points) can be set as to the area arming states for which each condition will be reported to the central-station (On, Stay, and/or Off).

Monitoring Station Connection: Central monitoring is supported through:

- The panel's built-in dialler ('Bell 103', 300 baud modem), and/or;
- An "IP" connection (LAN/WAN--if ≥ **v3.3** panel & software), or;
- A high-security Mark 7 / DVACS connection (Canada).

### The System Monitoring Window

The monitoring window shows the alarms and activity messages for the account selected in the tree (double-click an account to select).

**Tip:** Alarms typically appear with a red box next to them (click the red box to open a "Notes" window).

The top of the monitoring window shows either the newest messages, or all 'unresolved' (and higher priority) events first. As well, the window can be set to show all activity, or only specific types of events (saved per operator).

For details, refer to "Limiting the Window to Show Only Specific Messages", to follow/below).

**Tip:** You can customize how alarms and events will be displayed, and assign a sound to specific events if desired. For details, refer to the configuration topic: "Customizing How Events are Displayed"

The scroll-bar on the right allows viewing events that have been pushed off the bottom of the screen.

**Note:** The 'heartbeat' icon in the bottom-right corner of the screen will change to a red × until you select **[Return to Real-Time Mode]**. (While scrolling, new messages will not appear in the window.)

Messages are transmitted the MONITOR ISM Director software:

- When you connect with an associated panel (such as when updating a panel with changes, or to check the status of a device);
- When a (dial-up) panel calls in to transmit messages.

The **Archive** and **Purge** features allow keeping the activity log to a more manageable size.

See: "Exporting or Importing Activity or Audit Logs", and "Removing old Activity or Audit Logs".

### The Status Bar (bottom of the form)

The status area at the extreme bottom of the screen shows whether or not the software is presently connected with a specific panel, and/or if an update is presently in progress.

Activity messages are held at the specific panel whenever it is being updated/synchronized with the software (the messages will be available for transmission after the update is finished).

**Also See:** (Topics Pertaining to Central Monitoring):

- "Primary Reporting" selections under "Monitoring,

Paging, & Remote Mgt. Settings".

- "Reporting" setting under "Areas and Related Settings".
- "Inputs—Monitored Sensors", and the "Transmit" selections under "Inputs—Pre-Defined Point Types", "Inputs—Custom Point Types", and "Equipment Settings (Pseudo/Internal Inputs)".

## 'Activating' and Using the Monitoring Window

### Selecting an Account (Multi-Account Systems)

Click **[Account Folders]** in the 'tree', and locate and double-click the desired account. The monitoring window will show the messages for the account that have been received.

**Tip:** Your selected account will remain 'open' (e.g., for the event monitoring window) until you select **[Account Folders]** or **[Management]** in the 'tree'. Selecting an account is typically not required for a single-account system (single account license and/or operators without authority to edit account folders).

### Connecting to the Associated Panel(s), An Overview:

For the latest up-to-date messages, you must be connected with the associated panel(s). (Otherwise, you will see only messages that were received previously).

1) See if you're already connected by checking the status bar at the bottom of the monitoring window.
   Multi-account systems: Ensure your desired account is selected (click **[Account Folders]** in the tree, and then double-click the specific account).
2) If **not** connected, check to ensure the communication software is running on the specific PCs (check the Windows task-bar for an LCD/Telephone symbol). Start up the software if necessary.
   (From the **Start** menu, select: **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communications**.)
3) Select **Communications** from your MyTools bar, **or** click **[Communications]** in the 'tree', and select **Pending/OnLine**.
4) Click the **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu. Then, select the desired panel(s) (double-click to select), and set "Action" to "Normal", and "Frequency" to "Stay Connected" (✓). (Click **OK** when finished.)
5) Check that the connection is made, and watch for the panel updates to occur.
   (Click the 'Panel Group', and look for the status on the right side of the screen.)

**Note:** Alarm and activity messages are transferred after the panel updates (look for a connection state of 'Connected' and 'Idle State'.)

**Also See** (Related Topics):

**+** "Panel Communications and Updates"

### Opening and Adjusting the Monitoring Window

If the monitoring window is not visible, click **[Events]** on the toolbar.

If nothing seems to happen, click **[Reset]** on the toolbar (and click **[Events]** again if necessary). **Note:** If your desktop was accidentally saved with the monitoring window 'undocked' and hidden behind the main desktop, open the **View** menu, select **Desktop Settings**, and then **Default**.

To adjust the size of the monitoring window, position the mouse cursor at the top of the window, watching for the cursor to change shape. Then, click-and-drag the top of the window to the desired new position.

To maximize the size of the monitoring window, double-click its title-bar **twice**.

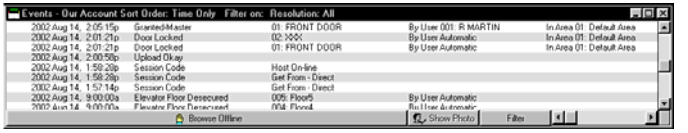
To restore the MONITOR ISM Director desktop at any time, simply click **Reset** on the toolbar.
(If the monitoring window is presently maximized, double-click its title-bar first.)

**Tip:** With multi-monitor support, you can place the monitoring window in a separate screen: Double-click the monitoring window title-bar, and then drag it onto the second screen.

**Reminders:** The monitoring window is updated only when you are connected with the specific panel(s). Muti-Account Systems: The monitoring window is active only while you have a specific account 'open' in the tree (select **[Account Folders]**, and then double-click the account).

**Monitoring Window Blank During or After a Panel Update:** The monitoring window may take a minute or two to refresh at the end of a panel communications session (please be patient). As well, to ensure the

desired type of messages are shown, click **[Filter]**, and verify the filtering / sorting selections (details in a following topic).




## Viewing Activity Messages

To view older messages in the monitoring window, click **[Browse Offline]**, and then use the scroll-bar on the right (click the up or down arrows, or slowly drag the control bar in the middle).

Click **[Return to Real-Time Mode]** to view the newest events as they occur. (These will appear at the top of the monitoring window.)

For longer messages, use the horizontal scroll-bar (bottom-right) to view the end or beginning of the desired message(s).

If you wish to **print** activity messages, refer to "Reporting on System & Personnel Activity.

When alarms occur, ensure they are not ignored. **Be sure to dispatch someone to deal with any conditions that require attention**.

Note: Sounds may be associated with alarm messages. (The default for alarms that require resolution is your PC's "exclamation" sound--as set through the Windows control-panel.)

---

- **Vertical Scroll-Bar (right-hand side):** Allows scrolling up and down to view older messages in the monitoring window. (Click the up or down arrow, or slowly drag the control bar.)

  Note: This puts you into "Offline Browsing" mode, and stops new events from entering the window. (Same as clicking **[Browse Offline]**.)

- **Horizontal Scroll-Bar (bottom-right):** Allows scrolling to the left and right to view longer messages. (Click the left or right arrow, or drag and release the control bar.)

- **Status Bar (bottom of screen):** Shows if the software is connected with a specific panel, and if an update is in progress.

- **[Browse Offline] / [Return to Real-Time Mode]:** Allows activating the event monitoring window vs. scrolling inside it.

- **[Show Photo]:** This allows manually opening the photo-verification window to view the last 1, 4, or 9 entrants.

  For more information, refer to "Visually Verifying Users (Photo-Verification)".

- **[Filter]:** Allows resorting the event / monitoring window, limiting the list to show specific types of messages only, and/or only messages that have not been 'resolved' (see last 2 items below, plus "Limiting the Window to Show Only Specific Messages".);

- **(Activity Messages):** Each message shows:
  - A coloured bar for the message priority;
  - The date and time the event occurred;
  - The type of event/message;
  - Details on the specific event.
  - A reference number and the name of the panel that sent the alarm;

"Session Code" messages pertain to panel communications/update sessions being started or completed. (For details on communications sessions that have occurred, refer to "Panel Communications and Updates".

"System Check" messages are for internal use, and/or of interest only when working with your technical support representative.

---

- **(coloured box):** Alarms are shown with a box/button on the left of the message (typically red, but customizable). Clicking the button allows entering a comment for the message (and viewing previous comments), and/or setting messages as being 'resolved';

  ✓: The event has been set as 'Resolved' (dealt with). (you'll see this only if displaying resolved events);
  ?: A comment has been entered, but the event was not set as 'Resolved'.

  Sounds: Custom sounds can also be associated with different types of alarms. The default sound for alarms that require resolution is the PC's 'exclamation' sound (as set through the Windows control panel).
  Related Topic: Customizing How Events are Displayed

- **Resolve All** (Right-click, or from the Edit Menu): Allows entering a comment for all displayed alarm messages, and setting them all as being 'resolved'.

  TechTip: Alarms and events can be set as 'resolvable' or not (i.e., whether or not the comment/resolution screen will be available). For details, refer to the configuration topic: "Customizing How Events are Displayed".

## Limiting the Window to Show Only Specific Messages (Sorting and Filtering)

Operators with "Event Filter" permission can set the monitoring window to show:

- All event messages for an account;
- Only 'unresolved' events;
- Events of a specific priority range;
- Events pertaining to a specific door, area, person, etc.

**Tip:** These selections are saved separately for each operator.

Exception: Scheduled Event Filters can be set up and assigned to operators--to determine the types of messages each operator will be able to see during vs. outside of set times.

Tip: A clock symbol on the **[ Filter ]** button at the bottom of the monitoring window indicates that scheduled event filtering is presently in effect (for the current operator).

Related Topic(s): Scheduled Event Filtering for Operators

You can also set the 'sort-order' for messages. To determine the present sort-order, and whether or not the list is limited to specific events, look for references in the title-bar of the monitoring window.

To set the window to show only specific types of messages, click **[Filter]** at the bottom, and make your selections from the pop-up window.

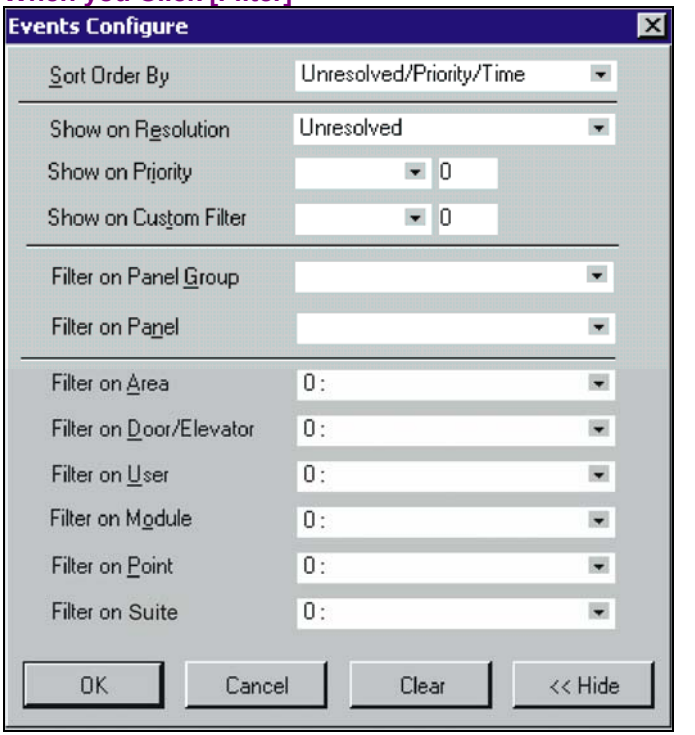
**Tip:** You can select **[Clear]** to remove your present 'filters', and return to showing all messages for the present account.

---

- **Sort Order By:** This allows listing messages in order by date/time only, or showing 'unresolved' (and higher priority) events first.
- **Filter on Resolution:** This lets you have the list include events depending on whether or not they have been 'resolved' (i.e., dealt-with).

  All: This shows all events--including ones not associated with the comment/resolution feature (i.e., not set as 'resolvable').
- **Filter on Priority:** This allows limiting the window to show only events of a desired priority value (or range).

### When you Click [Filter]




- **Filter on Custom Filter:** This allows limiting the window to show only events of a desired 'custom-filter' value (or range).

  **Also See:** To assign priorities, 'Custom Filter' values, and other parameters, refer to the configuration topic: "Customizing How Events are Displayed".
- **[Clear]:** Removes all filters--i.e., returns to the factory settings (and closes the 'filter' window).
- **[Return to Scheduled Filter]:** For an operator who's selections have temporarily overridden scheduled event filtering (requires "Events Filter" permission), selecting this will return to the scheduled settings.

  Note: This button becomes available once the filtering changes have been **saved** (e.g., exit, then return to this screen).

  Related Topic(s): • Scheduled Event Filtering for Operators; • Operator Permissions

### [More] / [Hide]

- **Filter on *Item*:** For events pertaining to a specific person or door, etc., select the desired item here.

# Dealing with Alarms (Comment / Resolve)

## Alarm Notes / Comments

While responding to alarms, you can enter a note for each alarm describing what caused it, what was done to correct the problem, etc. You can also set the alarm as 'resolved' ( ✓ ), or 'Keep Unresolved' ( **?** ).

**Tip:** You can set the monitoring window to show only alarms that either have, or have not been 'resolved' (for details, refer to the preceding topic).

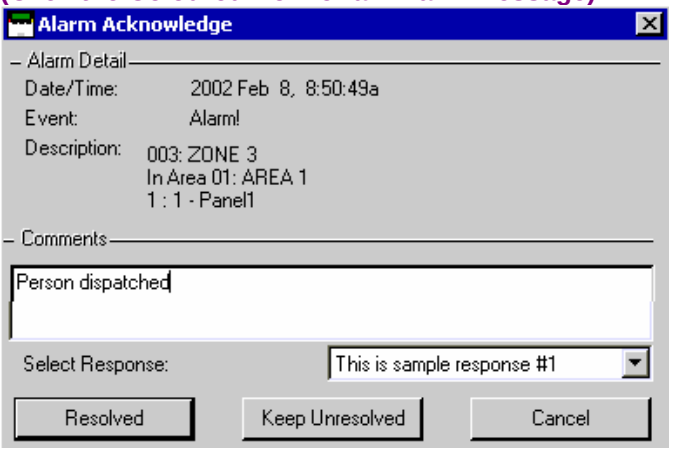
## Entering or Viewing Alarm Comments

To enter (or view) an acknowledgement note for an alarm, click the red area beside the alarm.

Then, enter the desired message and select **[Resolved]**, or **[Keep Unresolved]**.

You can enter two or three short notes (saved individually by clicking OK) or a single larger one for each alarm as desired.

**(Click the Coloured Box for an Alarm Message)**




- **Alarm Detail:** Details on the alarm, and when it occurred.
- **Comments:** Previously entered comments, plus an area to enter new one(s). **Tip:** There is enough space for two or three short notes (saved individually by clicking OK), or a single larger note.

  Tip: You can type your response, or select a previously-defined one to use as a starting point under "Select Response" (to follow).
- **Select Response:** This allows selecting a previously-defined response (open the 'drop-list' and make your selection). These responses can be used as-is, or edited as desired.

  **Note:** To be available here, sample responses must be defined first:
  Ref: Account Information ⇨**Event Response**
  📖 Event Responses for Acknowledging Alarms
- **[Resolved]:** Sets the event as having been dealt-with. If the alarm/monitoring window is **not** set to show only unresolved alarms, you'll see the message with a "✓" beside it.
- **[Keep Unresolved]:** This saves your comment, and displays the event with a "**?**" beside it to indicate further resolution is needed.
- **[Cancel]:** This aborts any changes you entered in the 'Alarm Acknowledge' screen.

**TechTip:** Alarms and events can be set as 'resolvable' or not (i.e., whether or not the comment/resolution screen will be available). As well, if 'instructions' have been set up for the specific type of alarm, they will appear here. For details, refer to the configuration topics:
+ "Alarm/Event Instructions", and
+ "Customizing How Events are Displayed".

## When Messages Cannot be Transmitted to the MONITOR ISM Director Software

If the MONITOR ISM Director software is not connected with the specific panel, messages are not transmitted, and each individual panel will retain up to 65,536 of the latest events that occurred.

**Exception:** Remote (dial-up) panels with their own dedicated external modem (i.e. one panel per modem) can be set to automatically 'dial-in' and transmit messages to the Director software. These messages will appear in the monitoring window when you access the associated account.)

For details, refer to "Monitoring, Paging, & Remote Mgt. Settings".

**Note:** Panel connections require that the communications software be running on the specific PC. The event-log capacity of each panel depends on the panel's "Feature Set" selection. For details, refer to "Account-Wide Panel Settings".

# Visually Verifying Users (Photo-Verification)

## Photo-Verification

### Introduction

Each operator can select door(s) to have the stored photo for entrants displayed each time someone gains access (or is denied entry) at any of the selected door(s). The last 1, 4, or 9 entrant's photos can be displayed.

The photo can then be used to verify each entrant's identity. This can be done locally--such as by an attendant in a reception area, or remotely through a camera on a map.

This feature is configurable separately for each operator (as described in a following section/below).

This pertains to the photo associated with each card/person **in the "Users" screen**. For details, see "The Photo-Badging Option".

### Connecting to the Associated Panel(s), An Overview:

This feature works only while you are communicating with the specific panel(s). To establish a connection:

1) See if you're already connected by checking the status bar at the bottom of the monitoring window.
   Multi-account systems: Ensure your desired account is selected (click **[Account Folders]** in the tree, and then double-click the specific account).
2) If **not** connected, check to ensure the communication software is running on the specific PCs (check the Windows task-bar for an LCD/Telephone symbol). Start up the software if necessary.
   (From the **Start** menu, select: **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communications**.)
3) Select **Communications** from your MyTools bar, **or** click **[Communications]** in the 'tree', and select **Pending/OnLine**.
4) Click the **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu. Then, select the desired panel(s) (double-click to select), and set "Action" to "Normal", and "Frequency" to "Stay Connected" (✓). (Click **OK** when finished.)
5) Check that the connection is made, and watch for the panel updates to occur.
   (Click the 'Panel Group', and look for the status on the right side of the screen.)

**Note:** The photo-verification feature will be available after the panel updates finish (look for a connection state of 'Connected' and 'Idle State'.)

**Also See** (Related Topics):

**+** "Panel Communications and Updates"

## Using This Feature

The photo window opens automatically whenever a person gains access at the specific door.

Multi-Account Systems: This works only while the specific account is selected. (Click **[Account Folders]** in the 'tree', and double-click the specific account.)

You can also open the photo window manually by clicking **[Show Photo]** at the bottom of the monitoring window.

Window Empty: The photo window is cleared each time settings are changed for this feature, and when you select anything outside of the specific account.

Now, visually compare the displayed photo with the person to verify their identity.

## Setting the Window Position

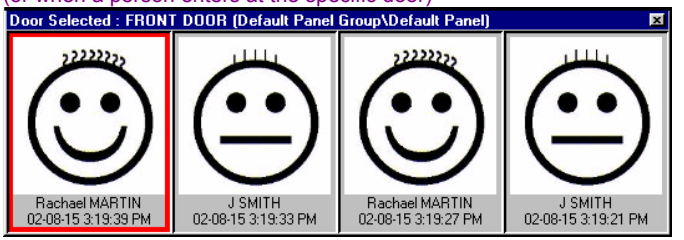
To reposition the photo window, simply click-and-drag its title-bar to the new location.

## Closing the Photo Window

To close the photo window at any time, click the **[X]** in the upper-right corner.

---

**View** (menu) ⇨**Photo Verification** ⇨**Show**
(or when a person enters at the specific door)




This screen shows the last 1, 4, or 9 persons who gained entry (or were denied access) at a door that you selected for photo-verification.

The photo window is cleared each time you change settings for this feature, and when you select anything outside of the specific account.

---

## Related Features

Additional features can be used in conjunction with photo-verification (all optional):

- Event-Triggered camera-viewing
  **See:** "Initial Set Up of: Views, Maps, Cameras" (especially step **3b**)
- Card-enrolment (or disabling) readers--that are also set to unlock. **See:** "Reader 1 & 2 Settings for a Door" (look for **[Card Action]** ).
- "Command Point" custom input points (e.g., to unlock the door, or "Grant Last User").
  **See:** "Input Points—Custom Point Types", and "Input Points—Monitored Sensors"
- "Grant Last User" command (right-click the door on a map)
  **See:** In the section on using maps and cameras, see: "Controlling an Area or Device" (look for "Door Commands", then "**Grant Last User**...").

## Setting up This Feature

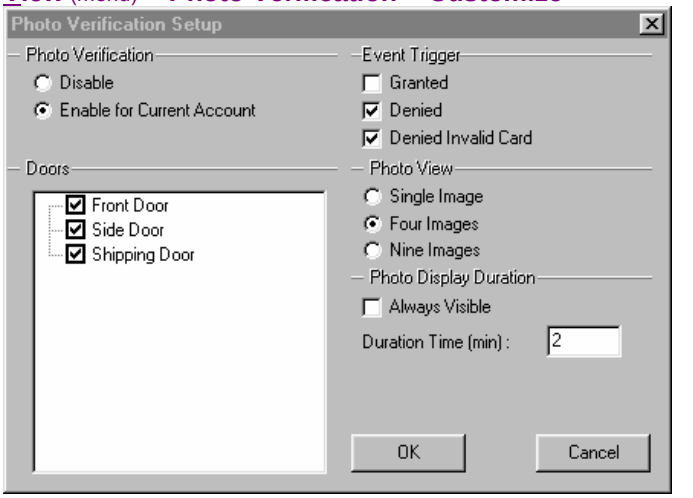
Each operator can set the photo-verification feature to suit their preferences.

Authorities: This feature is available to all operators.

### Steps:

1) Multi-Account Systems: Ensure you are 'in' the desired account. (Click **[Account Folders]** in the 'tree', and double-click the specific account.)
2) From the **View** menu, select ⇨**Photo Verification** ⇨**Customize**.
3) Refer to the selection-descriptions for this screen while making your selections.

**View** (menu) ⇨**Photo Verification** ⇨**Customize**




---

### Photo Verification

- **Disable**: Photo verification will be turned off while you are logged in (i.e., the present operator);
- **Enable for Current Account**: Select this to have photo-verification turned on while you are logged in (i.e., the present operator);

---

### Event Trigger

This allows setting the type of card-activity that will trigger the photo for each user at the selected door. You can select any or all of these items.

- **Granted**: Persons that are granted access;
- **Denied**: Valid/programmed cards that are denied access for general reasons (card expired, wrong time, wrong area, etc.);
- **Denied Invalid Card**: Persons denied access due to: • Wrong system code; • Wrong PIN entered; • Antipassback violation; • Wrong card version number; • Dual custody violation.

### Doors

This area shows all main panels and doors associated with your account, and allows selecting the door(s) to be associated with photo-verification. (Click to select or de-select doors in the list.)

Tip: You can change the way doors are displayed by right-clicking this area, and selecting from the pop-up menu (try it!). **Note:** To exit from "Physical view" (✓), just select it again.

---

### Photo View

This allows selecting the number of user photos that will be visible at one time (1, 4, or 9);

### Photo Display Duration

- **Always Visible**: The photo-verification window will remain open for as long as you remain 'in' the specific account;
- **Duration Time (min)**: If you do not select "Always Visible", this allows selecting how long the photo window will remain open each time it is activated (1-99 minutes).

Note: You can also close the photo window manually, by clicking the **[X]** in the upper-right corner.

# Checking Status and Controlling Items

# Maps and Video (Visual Monitoring & Status/Control)

## Status and Control Using Visual Director

### Welcome to Visual Director (Map/Camera Views)

Beginning with **V4.0**, MONITOR ISM Director includes a customizable visual interface for viewing live cameras, monitoring alarms, and controlling items. We call this "Visual Director".

Software Licensing: This is an optional feature (requires suitable software licensing). For details on activating purchased features, refer to "Software Activation and Licensing".

Camera Support: Cameras are supported through **Netvision**™ capture stations. For more information, refer to the on-line help or documentation provided with the Netvision software.

Grid view: Due to its visual nature, this feature uses 'forms' view only.

Initial Set Up / Camera Control and Adjustments: This section covers using 'Visual Director' to perform monitoring, status, and control tasks.

Also See: **"Camera Status/Control and Adjustments"**, and **"Initial Set Up of: Views, Maps, Cameras"** (both to follow / below).

Items to be available under Control & Status depend on the authorities associated with the user ID and PIN entered when logging into "Control & Status". If you were not asked to enter a user ID and PIN, then one has been set up for automatic entry in your operator settings. For details, refer to the section on "Operators".

Status monitoring (either manually, or through the status toolbar), requires that the MONITOR ISM Director system be connected with the specific panel(s), and the specific devices must be communicating.

**Also See** (≥ V4.0)**:**

+ For Form-based Status & Control: "Checking Status and Controlling Items"
+ To Set up Panel Communications for a New System: **"**New Installation? Try the Wizard "

### Connecting to the Associated Panel(s), An Overview:

**Tip:** If you will only be viewing or controlling cameras, you do not need to initiate a panel connection (i.e., you can skip these steps).

1) See if you're already connected by checking the status bar at the bottom of the monitoring window.
   Multi-**Account** systems: Ensure your desired account is selected (click **[Account Folders]** in the tree, and then double-click the specific account).
2) If **not** connected, check to ensure the communication software is running on the specific PCs (check the Windows task-bar for an LCD/Telephone symbol). Start up the software if necessary.
   (From the **Start** menu, select: **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communications**.)
3) Select **Communications** from your MyTools bar, **or** click **[Communications]** in the 'tree', and select **Pending/OnLine**.
4) Click the **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu. Then, select the desired panel(s) (double-click to select), and set "Action" to "Normal", and "Frequency" to "Stay Connected" (✓). (Click **OK** when finished.)
5) Check that the connection is made, and watch for the panel updates to occur.
   (Click the 'Panel Group', and look for the status on the right side of the screen.)

**Note:** Control & Status features will be available after the panel updates have finished (look for a connection state of 'Connected' and 'Idle State'.)

**Also See** (Related Topics):

+ "Panel Communications and Updates"

## Accessing This Feature (Visual Director)

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window. Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection as described previously/above.

Exception: If you will only be viewing or controlling cameras, you do not need to initiate a panel connection

**Topic Locator:**

Using the MyTools Bar: Select "**Visual Director**" from the MyTools bar (and login with your user ID and PIN if prompted for this).

Using the Tree: Click your site/account button in the tree, open **Control & Status**, and **Panel Control & Status** (click the "+"), and login with your user ID and PIN if prompted for this. Then, select "**Visual Director**" under "Panel Control & Status".

If this feature is not present: This feature is available only to operators with permission to access ALL configuration topics. You may also need to upgrade your software licensing.
**Related Topics:** + "Operator Permissions". + "Software Activation and Licensing".

Multi-Panel Systems: Maps are not limited to individual panels (and cameras are not related to panels).

Automatic Login: To set the 'login' to occur automatically for a specific operator, refer to the section on "Operators".

## Selecting Views

When 'in' the visual-director screen, defined map/camera 'views' appear on the "views toolbar". (**Default Position:** Top-right corner of the screen). Views that contain alarms are indicated with a flashing alarm-clock.

To open a desired 'view', select it on the toolbar.

Event-Triggered Cameras: These appear in 'camera-views' that show the last triggered camera (pertaining to the specific 'camera-view'). **Exception:** This type of window closes when you select a different 'view', or move to a different screen/topic.

If you see a small down-arrow on the end of the toolbar, you can click it to access additional map/camera views. Note: If your display mode is set to 800x600, you may need to hide the view-names on the toolbar to allow accessing the down-arrow. (Right-click the "Views" toolbar, and deselect **Show Button Captures**.)

The bars on the left end of the toolbar allow you to drag it to a new position if desired (in a fixed location, or floating above the desktop). **Tip:** If you 'drop' it in an undesired location, click **[Restore]** on the main toolbar.

## The 'Views' Toolbar

The "Views" toolbar provides access to all map/camera views that are presently set up.

To show or hide the view-name text in the toolbar:
Right-click within the title-bar, and select "**Show Button Captions**".
**Also See:** "Initial Set Up of: Views, Maps, Cameras"

## Moving Around and 'Zooming' In or Out

To enlarge a map or camera image, double-click the image (a blank area). To return to the previous size, click **[Return]**.

Similarly, if your maps include links to cameras and/or other maps, you can double-click a link to view the image.
(Method 2: Right-click the link, and select **Go to Link**.)

When you're ready to go back to the previous map, click **[Return]**.

If Area/Device Icons are Grey in Colour: This means you are not connected with the specific panel or account. For details, see: "Connecting to the Associated Panel(s), An Overview" (previous/above).

If Camera(s) are Not Available: This may mean that the applicable Netvision™ capture station is not running.

Camera Control and Adjustments: You can easily aim or zoom any camera that supports Pan-Tilt-Zoom operation. A number of other camera controls are also provided.

**QuickRef:** (bottom of camera window).
Also: Tools, ⇨Options, ⇨(Visual Director🗀 )
🕮 Camera Status/Control and Adjustments (a following section).

---

**Full-Screen:** To make the Visual Director window fill the whole screen, double-click its title-bar ***twice***. (To return to normal, double-click the title-bar once again, and click **[Reset]** on the main toolbar.)

**Zooming in or out on a map:** Click the desired map, then use one of these methods:

- Use your mouse scroll wheel, **or**;
- Use the **(+)** / **(-)** (magnifying glass) buttons at the bottom, **or**;
- Use the 'slider bar' on the right edge of the screen, **or**;
- Right-click a blank portion of the map. Then, select **Zoom**, and your desired action.

To move around (scroll) within a map, you have 3 choices. (1st click the desired map.) Then:

- Click-and-drag a blank area on the map (hold the mouse button down), **or**;
- Use the scroll bars provided, **or**;
- Use the "Universal Scroll" feature of your mouse (if it is set up for this).

**Tips:** The map will automatically shift to display the selected item. For status & control details, see a following section / below.

## Locating Items on a Complex Map, and Filtering to Show Fewer Items at a Time

To temporarily limit a map to show only a specific type of devices / objects:

**1)** Click within the desired map.

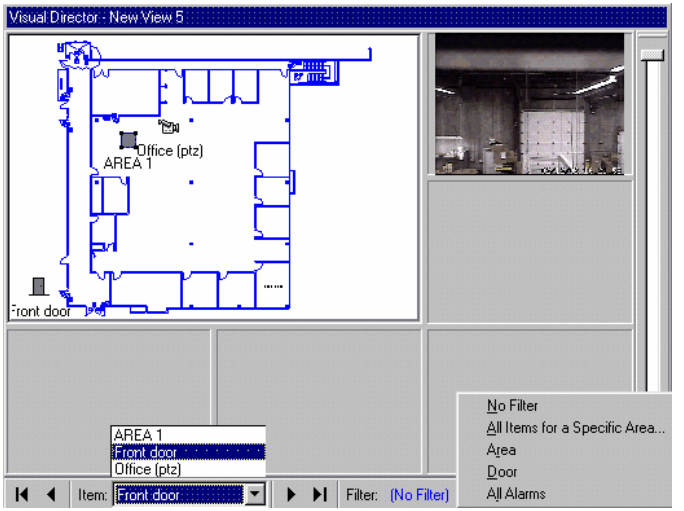
**2)** Click the small down-arrow to the right of "**Filter:**".

**Note:** This is at the bottom of the map window (NOT the **[Filter]** button at the bottom of the event/monitoring window).

**3)** Select your desired topic from the pop-up menu.

Then, scan the map for your item(s) of interest. If you cannot find the desired item on the map, look for (and select) it in the item-list at the bottom of the map window.
(If you still can't find it, ensure the desired item is not filtered-out accidentally.)

**Tip:** The map will automatically shift to display the selected item. For status & control details, see a following section / below.




- **Item** (bottom of the form)**:** This allows you to find a specific item on a complex map;

  **Tip:** Making selections here is well-suited for complex maps. For simpler maps, you'll likely prefer to scan the map visually. For status & control details, see a following section / below.

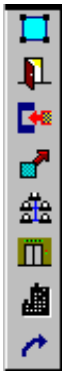
- **Filter:** This allows temporarily limiting a selected map to show specific types of devices only (click the small down-arrow to see the available choices).

  **Tip:** Do not confuse this with the **[Filter]** button at the bottom of the event/monitoring window. **Note:** The filtering stays in effect only until you select a different map (or any topic outside of Visual Director).

- **(+)** / **(-)** (**magnifying glass** symbols) and the '**slider bar**' on the right edge of the screen**:** These allow zooming in or out on a selected map.

  To show or Hide the Slider Bar: Right-click a blank area on the map. Then select "**View**", and "**Show Zoom Slider**" from the pop-up menu.

## Item Legend



An **Area** (including all associated devices);

A **Door** and associated reader(s);

An **Input Point** (sensor);

An **Output Point** (electronically triggered device);

An Expansion **Module**;

An **Elevator** (lift) and associated reader;

A **Suite-Security Keypad**;

A **link** to a live camera, or another Map.

**Flashing Green Box**: This indicates a 'selected' item on a map. (This pertains to navigating using the browse buttons at the bottom of the screen.)

To show or Hide Item-Names on a Map: Right-click a blank area on the map. Then select "**View**", and "**Show Item Text**" from the pop-up menu.

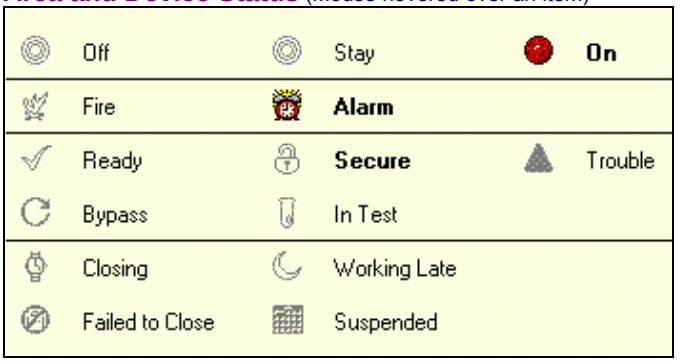
### Viewing the Status of an Area or Device

Open the applicable "View", and (locate) and select the desired device (Details: Previous/above).

Then, 'hover' your mouse cursor on top of the item, and watch for a pop-up status screen.

Jumping to the Control & Status Form: Right-click the area or device and select "Switch to Control & Status Screen for this Item" from the pop-up menu.

**Area and Device Status** (Mouse hovered over an item)




Various status aspects will be shown for the specific area or device. If you require more information on the listed information, look for an applicable topic under "Checking Status & Controlling Items".

**User's Guide:** Look in the table of contents near the front of the manual.
**On-Line Help:** Open the **Help** menu, and select **"Topics"** (and ensure the **Contents** tab is selected). If the Help is already open, select **[Topics]**, and then the **Contents** tab.

## Controlling an Area or Device

Open the applicable "View", and (locate) and select the desired device (Details: Previous/above).

Then, right-click the device and select your desired action from the pop-up menu.

Jumping to the Control & Status Form: Right-click the area or device and select "Switch to Control & Status Screen for this Item" from the pop-up menu.

## Dealing with Alarms

When an alarm occurs, always verify what caused it. **Be sure to dispatch someone to deal with any conditions that require attention.**

---

To silence an alarm, right-click the specific 'Area' on the map, and select **Silence**.

To set the event/monitoring window to show all events associated with a device or area, right-click the item and select "**Resolve and Show All Events for This Item**". To view only the **alarms** associated with a device or area, right-click the item and select "**Resolve**".

For more information on working with the monitoring window, refer to "Monitoring System Activity".

---

To enter a comment and set a single-alarm as having been resolved (or not), click the coloured box on the left of the alarm message. When the small screen appears, enter a suitable comment and select **[Resolved]** or **[Keep Unresolved]**.

To enter a comment and set **all** alarms for a device or area as 'Resolved' (or not), right-click the monitoring window and select "**Resolve All**". Then, enter a suitable comment, and select **[Resolved]** or **[Keep Unresolved]**.

( ⇨ )

## Common Commands--All Items
(After right-clicking the item)

- **Resolve** (when alarms present)**:** Sets the event/monitoring window to show only the present alarms for the selected area or device;
- **Resolve and Show all Events for This Item** (when alarms present)**:** Sets the event/monitoring window to show all alarms and events for the selected area or device;

  To return the Event/Monitoring Window to Its Previous State: Click **[Return to Previous Filter]** at the bottom of the window.
- **Switch to Control & Status screen for this Item:** This jumps you to the form-based "Control & Status" screen for the selected item.

## Area Commands (After right-clicking an Area)
Also See: "Common Commands", previous/above.

- **Off / Stay / On:** These selections allow manually arming or disarming the area (i.e., setting the arming level);

  **Tip:** If any input points (sensors) are presently tripped or bypassed, you will be guided though the steps to deal with this first (bypass / acknowledge).
- **Silence** (when an item is in 'alarm')**:** This shuts off the sounding of present alarms (i.e., shuts off the system siren output, and LCD keypad sonalerts).
- **Worklate:** This allows adjusting the area's scheduled closing time in increments of 30 minutes.
- **Lock All Doors in this Area:** This locks all doors with at least one reader associated with the specific area;
- **Unlock all Doors in this Area:** This unlocks all doors with at least one reader associated with the specific area;
- **Reset User Count In Area:** This allows resetting this area's "user-count" to zero.

  Note: 'User-counting' is configurable for each area. Ref: Configuration ⇨Areas ⇨**Activity**🗀.

## Door Commands (After right-clicking a Door)
Also See: "Common Commands", previous/above.

- **Lock:** This locks (re-locks) the specific door.
- **Unlock:** This unlocks the specific door.
- **Momentary Normal Unlock:** This unlocks the door for a duration equal to the standard "unlock duration". This is the same as someone gaining entry with an access card or token.
- **Momentary Extended Unlock:** This unlocks the door for a duration equal to the "extended unlock duration". This is the same as a user who is set for "extended unlock/challenged" gaining entry with an access card or token.
- **Pending Unlock:** This is an unlock command that waits for one person to enter the facility at the specific door.
- **Grant Last User -- Reader 1 (or 2):** If the last user at a reader was denied access, this will issue a 'Momentary Unlocking', and log that card/user as being granted entry.
  - Cards can be denied due to being expired, locked out, wrong time, wrong door class, etc. -- as long as they are defined in the system.
  - This feature will be unavailable if someone else is granted entry, or after 5 minutes from the time the person was denied access (although they can simply present their card/token again).
  - This may be used in conjunction with an event-triggered camera-view for the door (so a remote attendant can see the person).
    Related Topics: "Initial Set Up of: Views, Maps, Cameras" (step 3b).
  - This can also be used in conjunction with the pop-up "Photo-Verification" feature (if it is set to trigger on 'Access **Denied**' events).
    Related Topics: Visually Verifying Users (Photo-Verification)"
  - This **cannot** be used (or does not apply) with:
    - Cards being enrolled or disabled at a reader set to do this (although it will apply for cards denied due to wrong area/time, etc.);
    - Access being denied due to door interlock violations or area/disarm authority issues.

## Input-Point Commands

(After right-clicking a Sensor)
Also See: "Common Commands", previous/above.

---

- **Bypass / Remove Bypass:** "Bypass" allows arming an area with a tripped or faulty input point (sensor). "Remove Bypass" allows monitoring the input point again (for a sensor that is "OK").

## Output-Point Commands

(After right-clicking an Output/Device)
Also See: "Common Commands", previous/above.

---

Tips: First, select "**Manual Output Control**".
Additional parameters appear when applicable (duration, etc.).

- **Normal:** No manual control (i.e., return to normal operation);
- **Always:** Allows setting the output as On or Off continuously (until manual control is removed);
- **Momentary:** Allows setting the output to pulse/toggle once. Additional selections will appear for: • Whether it is to be triggered On (high), or Off (Low); • The state it will be left in afterwards (Off, On, or Normal); • How long the relay will remain triggered (1 second to 1 week).
- **Duty Cycle (1 sec. On/1 sec. off):** The output will be pulsed on and off continuously for a selected duration (1 second to 1 week).

## Elevator Commands

(After right-clicking an Elevator)
Also See: "Common Commands", previous/above.

---

- **Secure / Desecure:** This allows applying or removing controlled-access for all floors as accessed from the specific elevator (lift).
  (Secure: An access card or token provides access to specific floors; • Desecure: Anyone can access any floor without a card or token.

  Controlling a Floor (as accessed from all cabs): Refer to "Checking Status or Controlling Floors"

# Camera Status/Control and Adjustments

### Introduction

A number of camera controls are provided, allowing you to: • Aim or zoom PTZ cameras; • Check connection status; • Adjust image quality, etc. These features are provided through the video toolbar in each camera-image, with additional camera settings available under: **T**ools, ⇨**O**ptions.

### The Video Toolbar

When working in a 'view' that contains a camera-image, a small button in the bottom-left corner will provide access to the video toolbar.

To use this feature, refer to the item-descriptions for the video toolbar, plus the sections that follow.

Note: The video toolbar is available when viewing or customizing maps, but not when setting up 'Views'.

**(Show Video Toolbar)**

- **Hide Video Toolbar:** Closes/hides the video toolbar;
- **Change View Size:** Allows setting the maximum displayed image size for a camera (details to follow);
- **View Messages:** Allows viewing the camera/PTZ connection status for the camera (details to follow);
- **Start PTZ:** Allows working with a PTZ camera (details to follow);

## Controlling a Pan/Tilt/Zoom Camera

You can easily aim or zoom any camera that supports Pan-Tilt-Zoom operation.

Initial Set Up: PTZ cameras must be identified and properly set up. **Details:** Step 1b: Define Cameras (under "Initial Set Up of: Views, Maps, Cameras", to follow).
User Permissions: Only one person can control a specific PTZ camera (COM port) at a time. Who will get access is based on:

- The username assigned to the camera during initial set up;
- PTZ user priorities defined at the capture station (for each PTZ username).

Event-triggered 'camera-views': Control of PTZ cameras is not supported in event-triggered 'camera-views'--although you can use a 'view' that contains the specific camera (or a link to the camera) to access PTZ control.

⇨ ⇨**Then hover over the Camera-Image**

### Steps:

**1)** Open the 'View' that contains the desired camera-image.
MyTools Bar: **Visual Director** (+User login if prompted). Tree: Control & Status, ⇨Panel Control & Status (+User login if prompted), ⇨**Visual Director**.
Then, select from the 'Views' toolbar (top-right).

**2)** Open the video toolbar by clicking the button in the bottom-left corner of the camera-image. Then, click the 4th button ("Start PTZ").

**3)** 'Hover' your mouse around the camera-view, and watch for the cursor to change to an arrow or magnifying glass.

**4)** Click (or click and hold) the image with the cursor indicating your desired action.

For options and more information, refer to the screen image and item-descriptions.

- For cameras that support pan-tilt-zoom (PTZ) control, your mouse cursor will change to indicate different pan-tilt-zoom directions as you move around the camera-view. (Click, or click-and-hold with the mouse indicating the desired action.)
  To zoom out: **Right**-click-and-hold near the centre of the screen (magnifying glass).
- **Adjust PTZ Speed:** After clicking "Start PTZ", an additional button will appear on the right which allows opening the PTZ speed control. The length of the blue bar indicates the present relative speed. To adjust the speed click a new position on the speed indicator bar, or click the + / - symbols at either end.
- **X:** This closes the PTZ speed control, and returns you to the camera-image.

## Checking Camera/PTZ Connection Status

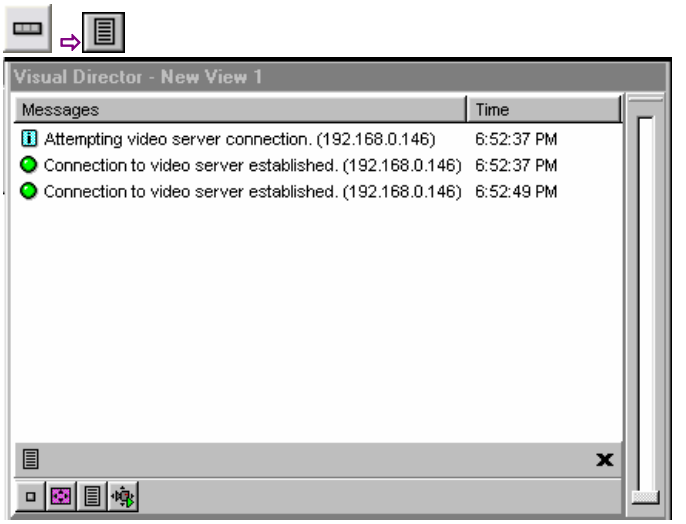
Camera and PTZ connection status can be viewed at any time.

**Steps:**

**1)** Open the 'View' that contains the desired camera-image.
MyTools Bar: **Visual Director** (+User login if prompted). Tree: Control & Status, ⇨Panel Control & Status (+User login if prompted), ⇨**Visual Director**.
Then, select from the 'Views' toolbar (top-right).

**2)** Open the video toolbar by clicking the button in the bottom-left corner of the camera-image. Then, click the 3rd button ("View Messages").

For more information, refer to the item-descriptions for this screen.




- This screen shows the connection status for the camera being viewed.
  Flashing Yellow Symbol: When a problem occurs (such as PTZ timeout), the 'View Messages' button will appear with a warning symbol.
- **X:** This closes the status window and returns you to the camera-image.

## Setting the Maximum Camera-Image Size

Camera-images auto-size relative to the window they are displayed in.

Exception: To avoid jagged looking images, you can set the maximum displayed image-size for each camera.

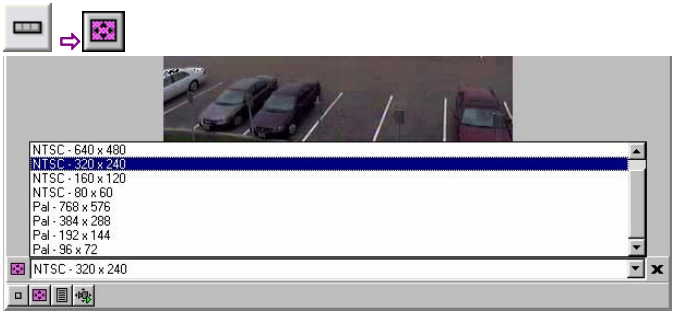
**Steps:**

**1)** Open the 'View' that contains the desired camera-image.
MyTools Bar: **Visual Director** (+User login if prompted). Tree: Control & Status, ⇨Panel Control & Status (+User login if prompted), ⇨**Visual Director**.
Then, select from the 'Views' toolbar (top-right).

**2)** Open the video toolbar by clicking the button in the bottom-left corner of the camera-image. Then, click the 2nd button ("Change View Size").

**3)** Click the down-arrow on the right to open the list and make your selection.

For more information, refer to the item-descriptions for this screen.




- This screen allows setting the maximum displayed image-size for the camera being viewed.
- **X:** This closes the image-size control, and returns you to the camera-image.

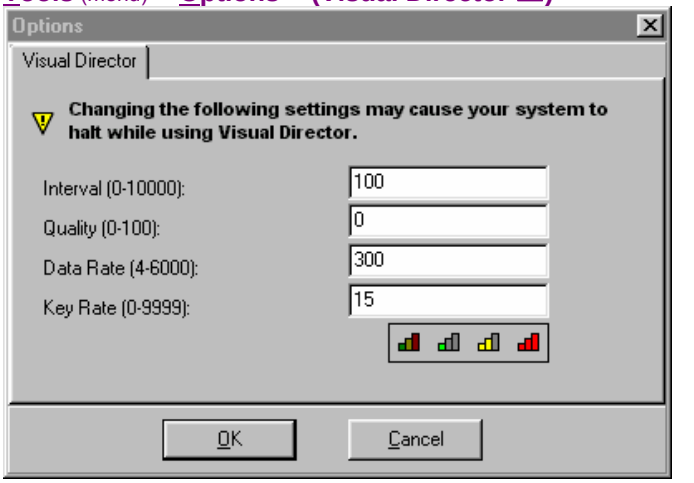
## Adjusting Camera Quality for your Connection/Bandwidth

Various camera-Image quality settings are provided to allow for slower connection speeds and reduced-bandwidth applications.

Notes: These selections affect all cameras for the selected account. Features pertaining to maps and cameras are not supported with single-panel licensing.

Maximum Image Quality: Camera images are transmitted based on the recording mode at the NetVision™ capture station (if presently being recorded there), or per the present/last displayed image size for any camera on the same capture board displayed at the capture station.

**Tools** (menu) ⇨**Options** ⇨**(Visual Director 🗀)**




### Steps:

**1)** Multi-Account Systems: Ensure you are 'in' the desired account. (Click **[Account Folders]** in the 'tree', and double-click the specific account.)

**2)** Open the **Tools** menu, and select **Options**. (Tip: If not listed, see step 1).

Note: If the "Options" screen contains only an 'Autostart' option, this means you have single-panel licensing (maps/cameras not supported).

**3)** Refer to the selection-descriptions for this screen while making your selections.

Tip: The easiest way to change these settings is using the coloured buttons across the bottom. See "Coloured Buttons" for details.

---

- **Interval**: Sets the duration between camera image requests--in milliseconds (1000 = 1 frame per second).
- **Quality**: Sets the relative amount of video detail to be included in non-key frames. Also see "Key Rate", to follow.
- **Data Rate**: This is a bandwidth control property that determines the maximum video data transmission rate. (Defaults: Low = 56, Medium = 220, High = 3000).
- **Key Rate**: This determines how often a complete frame is sent compared to only changes from the previous frame. Lower values provide better image quality and require more bandwidth

---

- **Coloured Buttons**: These buttons provide (from left to right): A quick way to return to:
  • General default values, or;
  Select pre-defined defaults suitable for:
  • Low, • Medium, or; • High available bandwidth (i.e., dial-up connection, DSL/cable, or local network).

# Initial Set Up of: Views, Maps, Cameras

## Introduction to Map/Camera Set Up

"Views" and "Maps" must be set up before visual monitoring and/or status & control tasks can be performed.

**Notice:** It is extremely useful to familiarize yourself with the operation of this feature, and plan how you want your views and maps set up before you begin.

Grid view: Due to its visual nature, this feature uses 'forms' view only.

**Permissions:** Setting up maps, cameras, and 'views' requires an operator with permission to "Configure Visual Director". This permission is also required to change camera image quality/sizing (right-click menu).

## Supported Map File Formats

Map images to be used with this feature must have been saved in one of these file-formats:

- Vector/Drawing Formats: WMF, EMF
- Bitmap/Photo Formats: BMP, JPG

## Requirements for Camera Viewing

Camera viewing (and PTZ control) is supported through Netvision™ capture stations.

**Required Items:**

- TCP/IP protocol must be installed and set up on your PC (this is typically done automatically as part of the MS Windows installation);
- You must have an available connection to a network, the internet, or "dial-up networking" to allow connecting with the capture station; (And the capture station PC and software must be running.)
- The IP address (or name) of each specific capture station PC must be known;
- The capture station "Video Server" must be set to allow anyone to view cameras (through the Windows Control Panel);
- The desired camera number should be known;
- For control of PTZ cameras (pan-tilt-zoom), you will need to have a valid PTZ username for each specific capture station.

For details on setting up a Netvision™ capture station, refer to the on-line help or other documentation provided with the Netvision software.

## Step 1a: Define Source Maps

Map image files need to be identified to the system before they can be displayed.

**Topic Locator:**

MyTools Bar: **Customize Views**, (login with a user name & ID if needed), select the **Maps** 🗀.

In the Tree: Click your site/account button in the tree, open **Control & Status**, and **Panel Control & Status** (click the "**+**"), and login with your user ID and PIN if prompted for this. Then, select: "**Visual Director**" (click the "**+**"), ⇨**Customize Views**, ⇨**Maps**🗀.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Click **[Add]** to set up a new map, or right-click an existing one and select **Edit Map**. Then, set the name as desired, and click **[...]** to browse for a desired image file (select the file and click **[Open]** ).

See the selection-descriptions for more information (especially "**Create Duplicate Map**").

### Visual Director ⇨Customize Views ⇨Maps 🗀

- **[Add]:** Allows identifying a new map image;
- **[Delete]:** Allows deleting an existing map from the list.

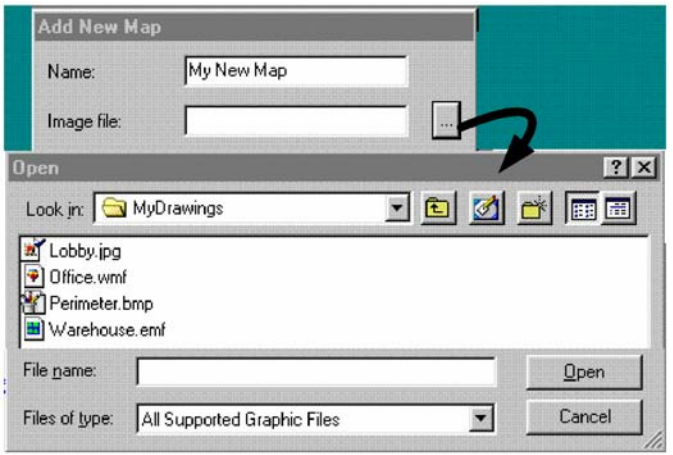
### After Right-clicking an Existing Map in the List

- **Add New Map:** Allows identifying a new map image;
- **Edit Map:** Allows changing the name or source file for a map that has already been identified to the system;
- **Create Duplicate Map:** When areas and devices are added to a specific map (step 3a, to follow/below), all views that use the same map will show the same items. "Create Duplicate Map" allows setting up different maps based on the same image file.

  Notes: For a map with devices already placed on it, the device placement will be copied as well (delete/change these as desired).
- **Delete Map:** Allows deleting an existing map from the list.

### Visual Director ⇨Customize Views ⇨Maps 🗀

⇨**[Add]** (or right-click a map in the list, and select "**Edit Map**")




- **Name:** Enter a suitable name for the map. (This will typically refer to the location or department associated with the image.)
- **Image File:** This is the location (path) and filename of the map image file. **Tip:** Click **[...]** to browse for the file.

  (Select the file and click **[Open]** ).

## Step 1b: Define Cameras

Cameras need to be identified before they can be displayed by the Director software.

**Topic Locator:**

MyTools Bar: **Customize Views**, (login with a user name & ID if needed), select **Cameras** 🗀.

In the Tree: Click your site/account button in the tree, open **Control & Status**, and **Panel Control & Status** (click the "**+**"), and login with your user ID and PIN if prompted for this. Then, select: "**Visual Director**" (click the "**+**"), ⇨**Customize Views**, ⇨**Cameras**🗀.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Click **[Add]** to identify a new camera, or right-click an existing one and select **Edit Camera**. Then, refer to the selection-descriptions while entering values for this camera.

---

Also See: Once the cameras and views have been set up, you can easily aim or zoom any camera that supports Pan-Tilt-Zoom operation. A number of other camera controls are also provided.

QuickRef: (bottom of camera window).
Also: Tools, ⇨Options, ⇨(Visual Director🗀 )
🕮 Camera Status/Control and Adjustments (previous).

Note: The video toolbar is available when viewing or customizing maps, but not when setting up 'Views'.

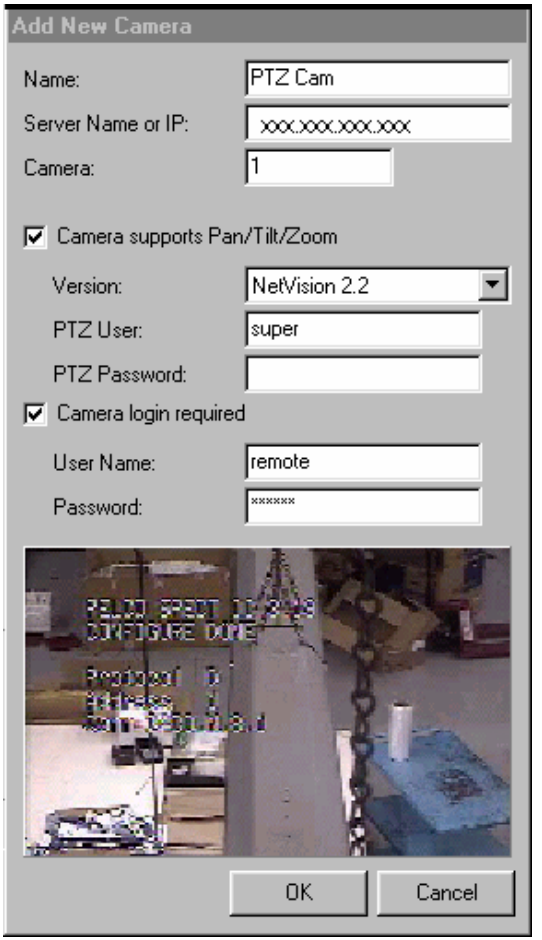
### Visual Director ⇨Customize Views ⇨Cameras 🗀

- **[Add]:** Allows identifying a camera to the system.
- **[Delete]:** Allows deleting an existing camera from the list.

### After Right-clicking an Existing Camera in the List

- **Add New Camera:** Allows identifying a camera to the system.
- **Edit Camera:** Allows changing the name and other information for a camera that has already been identified to the system.
- **Create Duplicate Camera:** This saves some time for additional cameras from the same capture station (i.e., you won't have to re-type the capture station IP address). After using this selection, right-click "Copy of *CameraName*" in the list, select "**Edit Camera**", and set the name and camera number as desired.
- **Delete Camera:** Allows deleting an existing camera from the list.

## Visual Director ⇨Customize Views ⇨Cameras ⇨[Add] (or right-click a camera in the list and select "Edit Camera")




- **Name:** Enter a suitable name for the camera.
- **Server Name or IP:** This is the IP address (or PC name) of the specific Netvision™ capture station;

  Note: To view cameras, a connection must be available. If unsure, go to a command prompt and try 'pinging' the IP address.
- **Camera:** This is the camera number/ID as seen from its capture station;

---

- **Camera Supports Pan/Tilt/Zoom:** Select this to allow PTZ control for a camera that supports this;

  **Tip:** For a non-PTZ camera (or if PTZ control is not desired), ensure this is NOT selected.
- **Version:** Select the version of NetVision™ software that is installed at the specific capture station;
- **PTZ User:** Enter a valid remote user name (with permission to control PTZ cameras) as set up at the specific capture station.
- **PTZ Password:** Enter the login password for the 'PTZ User'.

---

- **Camera Login Required:** Select this if the NetVision™ capture station is set to only allow registered users to view cameras (i.e., NOT set to allow anyone to access the video server).
- **User Name:** Enter a valid remote user name (with permission to view cameras) as set up at the specific capture station.
- **Password:** Enter the login password associated with the 'User Name' entered above.

  Note: For a PTZ camera, the same user name and password is typically used for viewing cameras and PTZ-control.
- **(camera display area):** The Director software will automatically attempt to connect and display the camera-image at the bottom of the form.

  Tip: To try again after changing the camera number or server name/IP address, press the tab key, or click within another setting on the form.

### Step 1c: Define Camera-Views

(this is required only for event-triggered camera-views)

As an alternative to fixed cameras appearing in different locations on-screen, camera-views can be thought of as 'locators' that allow you to set where specific types of event-triggered camera images will appear (separately for each 'view'). Each camera-view shows the last-triggered camera associated with it.

Exception: Camera-views close when you select a different 'view', or move to a different screen/topic.

**Tip:** Be sure to create additional camera-views for cameras that are to appear in different locations on-screen.

(For more information on this feature, and to assign a camera-view and camera to each device, see step 3b.)

**Topic Locator:**

MyTools Bar: **Customize Views**, (login with a user name & ID if needed), select **Camera-Views** 🗀.

In the Tree: Click your site/account button in the tree, open **Control & Status**, and **Panel Control & Status** (click the "**+**"), and login with your user ID and PIN if prompted for this. Then, select: "**Visual Director**" (click the "**+**") ⇨**Customize Views**, ⇨**Camera-Views**🗀.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Click **[Add]** to define a new camera-view, or right-click an existing one and select **Edit Camera-View**. Then, set the name as desired (see the name description for details).

---

#### Visual Director ⇨Customize Views ⇨Camera-Views 🗀

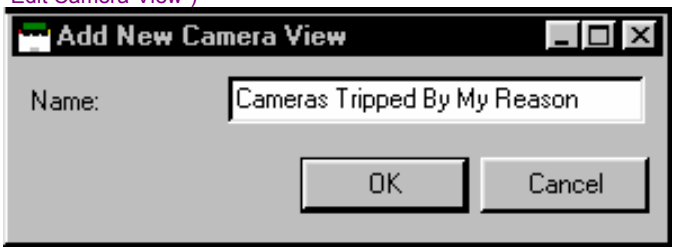
- **[Add]:** Allows creating a new camera-view.
- **[Delete]:** Allows deleting an existing camera-view.

#### After Right-clicking an Existing Camera-View in the List

- **Add New Camera-View:** Allows creating a new camera-view (same as clicking the **[Add]** button).
- **Edit Camera-View:** Allows changing the name for a camera-view that was defined previously.
- **Delete Camera-View:** Allows deleting an existing camera-view.

  **Notice:** This will disable the event-triggered camera display feature for any doors and input points that are using this camera-view.

#### Visual Director ⇨Customize Views ⇨Camera-Views ⇨[Add] (or right-click one in the list and select "Edit Camera-View")




- **Name:** Enter a suitable name for the camera-view. This will pertain to your specific needs and preferences (e.g., Doors, Motion-Detectors, Sensors in Area X, Button ABC pressed, etc.).

## Step 2: Set up Views

"Views" are definable layouts for maps and camera images. These must be set up to allow viewing maps and/or cameras.

Note: Items added to a specific map will appear on that map in every 'view' that contains it.

### Topic Locator:

MyTools Bar: **Customize Views**, and (login with a user name & ID if needed).

In the Tree: Click your site/account button in the tree, open **Control & Status**, and **Panel Control & Status** (click the "**+**"), and login with your user ID and PIN if prompted for this. Then, select: "**Visual Director**" (click the "**+**"), ⇨**Customize Views**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

**Tip:** For additional space, it's a good idea to turn off the event/monitoring window when setting up 'Views'. (Click **[Events]** on the main toolbar.)

---

**Creating a New View:** Click **[+]** at the bottom of the form, or right-click the form, and select **Add New View** from the pop-up menu. Alternative: You can also select "**New View**" from the list (bottom of the window).

**Changing an Existing View:** Select the desired "View" from the pop-up list at the bottom of the window.

**Searching for an Existing View:** Click the 'binoculars' symbol. Then, enter the name (or the first few characters + "*" ), and click **[Find]**.

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

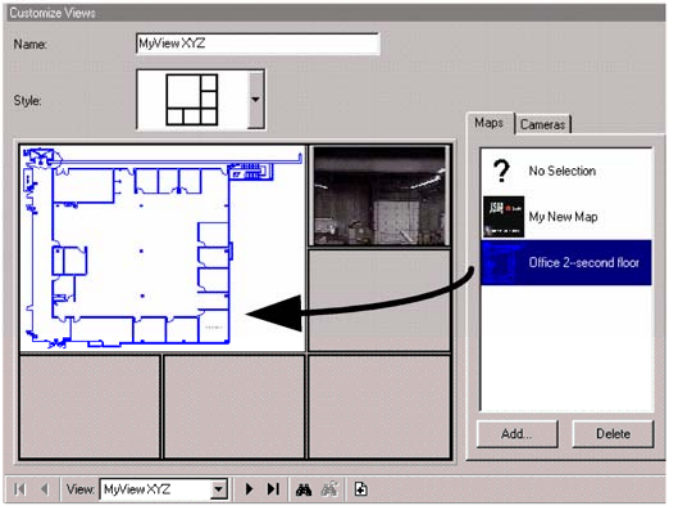
To Copy an Entire View: Right-click, "Copy View"; right-click, "Add New View"; right-click, "Paste View". Then, change the name and other items as desired.

If you Need to Delete a View: Right-click a blank area on the view, and select "Delete View".

---

- **View** (bottom of the form)**:** This allows selecting an existing 'View' (or select "New View" to set up a new one).

### Visual Director ⇨Customize Views




## On This Form

- **Name:** This is a description for the displayed map/camera view;
- **Style:** This is a basic layout style for the displayed map/camera view (the centre of the screen will change per your selection);

## Maps 🗀, Cameras 🗀, and Camera-Views 🗀

These 'tabs' show a list of the presently defined Maps and Cameras. Click-and-drag items to the desired location.

**Tip:** For items that have already been placed on the left, you can click the item to have it identified on the right. (Try it! )

To **remove** an item from a 'view', drag the item back into the list (or drag to item called "No Selection" to the item's location).

**Notes:** Each item can appear only **once** within a single view. The software will attempt to connect with cameras right-away.

Camera-views: These allow you to set where specific types of event-triggered camera images will appear (for each view that uses this feature). Each camera-view shows the last-triggered camera associated with it. Be sure to use additional camera-views for cameras that are to appear in different locations on-screen. (For more information, see step 3b.)

### Step 3a: Place Items onto Maps (Doors, Sensors, etc.)

Customizing maps pertains to placing objects on specific **maps** to enable visual monitoring, and status/control features.

Attention: Items added to a specific map here will appear on that map in every 'view' that contains it. (To avoid this, you can copy a map and save it as a new one, or create new map(s) using the same image file. For details, see step 1a.)

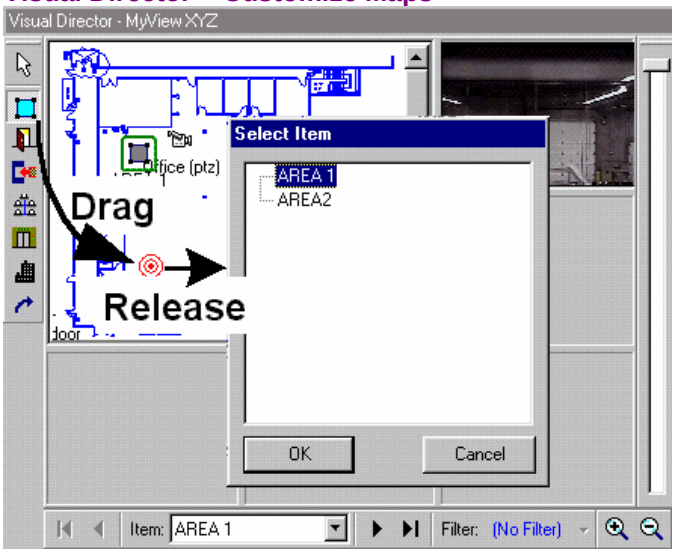
**Topic Locator:**

MyTools Bar: **Customize Maps**, and (login with a user name & ID if needed).

In the Tree: Click your site/account button in the tree, open **Control & Status**, and **Panel Control & Status** (click the "**+**"), and login with your user ID and PIN if prompted for this. Then, select: "**Visual Director**" (click the "**+**"), ⇨**Customize Maps**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

**Visual Director ⇨Customize Maps**




Then, refer to the details for this screen while viewing or changing settings as desired.

---

This screen shows your selected view with its associated maps and cameras, along with the areas and devices that have been placed on each map (so far).

To select (or search for) a desired 'view', see step **2** (previous/above).

Navigating: You can enlarge (double-click), and zoom/scroll within maps as desired.

**For details on:** What the Device Icons mean, and how to scroll and zoom within a map, refer to: "Moving Around and 'Zooming' in or Out" (under "Maps and Video (Visual Monitoring & Status/Control)", previous).

To position objects on a map: Drag the symbol for your desired item-type (upper left) to the desired location on each specific map. When you 'drop' the item in place, you'll be asked to select the specific area or device.

Creating a Link to a Camera or Another Map: The 'link' icon (arrow) allows linking to a camera or other map, and setting the location it will appear. When you drop the link icon in place, a form will appear showing defined maps and cameras, with a copy of the present view. To complete the link, drag the item to the desired location (or select the item, then the location). Then, click **[OK]**.

Removing an Item from a Map: Right-click the item, and select Delete from the pop-up menu.

**Note:** If the menu does not include a "Delete" selection, right-click the item again.

### Step 3b: Set Up Event-Triggered Camera-Views

Doors and sensors on maps can be associated with a 'camera-view' to trigger a camera when selected events occur at the device (access denied, sensor tripped, etc.).

Notes: This feature pertains to individual 'views' (i.e., the map and 'camera-views' must be on the same 'View', and the camera images will be visible only when that 'view' is displayed. Conversely, "Advanced Camera Settings" (camera-view assignments) on a specific map will apply to ALL 'views' that contain the same map, though the camera(s) will be visible only for 'views' that contain the target 'camera-view'.

Panel Firmware: This feature requires panel firmware version 4.15 or 4.2 (where available) or newer.

**Overview of Steps:**

- Define maps (1a), cameras (1b), and camera-views (1c).
- Define view(s) and arrange the desired maps, cameras, and/or 'camera-views' therein (2).
- Place items such as doors and sensors (input points) onto the maps (3a).
- Set "Advanced Camera Settings" for each device that is to trigger a camera (to follow).

**Topic Locator:**

MyTools Bar: **Customize Maps**, and (login with a user name & ID if needed).

In the Tree: Click your site/account button in the tree, open **Control & Status**, and **Panel Control & Status** (click the "**+**"), and login with your user ID and PIN if prompted for this. Then, select: "**Visual Director**" (click the "**+**"), ⇨**Customize Maps**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, right-click the item (door or sensor), and select **Advanced Camera Settings** from the pop-up menu.

Now, refer to the details for this screen while viewing or changing settings as desired.

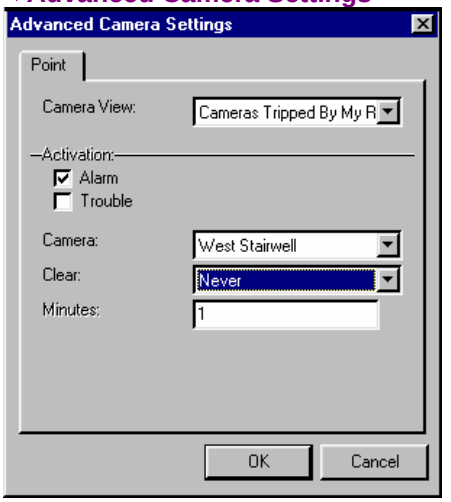
---

- **Camera View:** A previously-defined placeholder that determines where the camera image will appear. (Each camera-view shows the last-triggered camera associated with it.)

  Exception: Camera-views close when you select a different 'view', or move to a different screen/topic.

  Note: For a camera-image that cannot be overwritten by another one, use : • A fixed camera (step 2); • A link to a fixed camera (step 3a), or; • Set up a 'camera-view' that will not be used with any other cameras (steps 1c & 3b).

**Visual Director ⇨Customize Maps ⇨(right-click an item) ⇨Advanced Camera Settings**




## On This Form

Door with two Readers: The following sections are available separately for each reader.

- **Activation:** Select the states/conditions that you wish to trigger the camera (e.g., alarm, trouble, access denied, etc.);

  Alarm: Forced entry, door held open too long, etc.
  Trouble: Door sensor circuit problems (e.g., cut or shorted wiring).

- **Camera:** Select the camera that is to be displayed when the selected event(s) occur at the specific door or sensor;

- **Clear:** Whether or not the camera image is to be closed/cleared automatically after a certain period of time;

  Never: The camera image will be left in place (until you select a different view, or select some other task).
  Timer: The camera image will remain only for the number of minutes that you select below (or until you select a different view, etc.).

- **Minutes:** With "Clear" set as "Timer", enter the number of minutes here (1 – 1440).

  Tip: 1440 minutes is one day (24 hours).

# Checking Status & Controlling Items

## Introduction to Status & Control

### The Status and Control Feature

MONITOR ISM Director can monitor the status of most system, area, and device aspects, and allows controlling the system on an area-by-area basis, or for individual doors or input points.

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To Connect: "New Installation? Try the Wizard

The status for individual items at specific site can be checked manually, as desired. As well, the status toolbar allows monitoring a desired account for various items (sirens, fire alarms, other alarms, and trouble conditions), and provides a quick way to view the details for each item.

Items to be available under Control & Status depend on the authorities associated with the user ID and PIN entered when logging into "Control & Status". If you were not asked to enter a user ID and PIN, then one has been set up for automatic entry in your operator settings. For details, refer to the section on "Operators".

Status monitoring (either manually, or through the status toolbar), requires that the MONITOR ISM Director system be connected with the specific panel(s), and the specific devices must be communicating.

If an item is listed as 'Off-Line', this typically indicates either a communications problem, or a set-up error (such as an incorrect module/POD serial number).

If all items on a screen are grey in colour, this generally means that you are either not connected with the specific panel, or the applicable module is 'off-line' (not communicating).

Items changed through 'Control & Status' (such as unlocking a door, or locking-out cards, etc.) remain in effect until changed by another person or by a scheduled Configuration setting.

### Connecting to the Associated Panel(s), An Overview:

**1)** See if you're already connected by checking the status bar at the bottom of the monitoring window.
Multi-**Account** systems: Ensure your desired account is selected (click **[Account Folders]** in the tree, and then double-click the specific account).

**2)** If **not** connected, check to ensure the communication software is running on the specific PCs (check the Windows task-bar for an LCD/Telephone symbol). Start up the software if necessary.
(From the **Start** menu, select: **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communications**.)

**3)** Select **Communications** from your MyTools bar, **or** click **[Communications]** in the 'tree', and select **Pending/OnLine**.

**4)** Click the **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu. Then, select the desired panel(s) (double-click to select), and set "Action" to "Normal", and "Frequency" to "Stay Connected" (✓). (Click **OK** when finished.)

**5)** Check that the connection is made, and watch for the panel updates to occur.
(Click the 'Panel Group', and look for the status on the right side of the screen.)

**Note:** Control & Status features will be available after the panel updates have finished (look for a connection state of 'Connected' and 'Idle State'.)

**Also See** (Related Topics):

**+** "Panel Communications and Updates"

## Accessing the Control and Status Topics for a Panel

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection as described previously/above.

Then, access your desired topic:

**Using the MyTools Bar:** Select the desired Control and Status topic from the MyTools bar (and login with your user ID and PIN if prompted for this).

**Using the Tree:** Click your site/account button in the tree, open **Control & Status**, and **Panel Control & Status** (click the "**+**"), and login with your user ID and PIN if prompted for this. Then, select your desired topic in the 'tree' (under "Panel Control & Status").

If 'Panel-Groups' and 'Panels' are Listed Under Control & Status: Select (open), your desired panel-group and panel if these are listed in the 'tree'. Tip: "Control & Status" (and configuration) topics can be set to display either as a single list, or on a panel-by-panel basis. (To change the view: Right-click "Control & Status", and select or deselect **Logical Tree View**). For more information, refer to "Other Desktop Choices".

---

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode (**forms** view is generally recommended for Control & Status topics).

Then, refer to the topic associated with your desired Control & Status topic.

Note: If the status window appears blank, or unavailable (items are grey in colour), this means you are not connected with the specific panel or account. To initiate a connection, refer to "Connecting to the Associated Panel(s), An Overview" (previous/above).

Automatic Login: To set the 'login' to occur automatically for a specific operator, refer to the section on "Operators".

**If "Cannot Log In to Control and Status due to a Conflict" appears**: This means the same data may have been changed through the software and locally through a keypad. When an operator with configuration permissions accesses the 'configuration' topic for the mentioned item, they will be prompted to correct the conflict. For details, refer to "Correcting Communication / Update Errors".

# Using the Status Toolbar

## The Status Toolbar

The status toolbar allows monitoring for various items (sirens, fire alarms, other alarms, and trouble conditions), and provides a quick way to view the details for each item.

Multi-**Account** Systems: You can set the account to be monitored by the status toolbar (when each operator is logged in) by clicking **[Monitor]** on the far-right end of the toolbar. This can also be set in the screen for each operator. For details, refer to the section on "Operators".

The status toolbar is active only when the system is connected with the specific panel(s).

The status toolbar will remain active when the software is in lockout mode (operator/keyboard lockout). This allows continuous monitoring of an account while blocking access to other features.

For details on the lockout feature, refer to "Exiting, Logging Off, or Changing Operators".

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

## Using the Status Toolbar

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

Multi-**Account** systems: To verify which account is being monitored by the status toolbar, click the button on the far-right end of the toolbar.

---

Then, refer to the selection-descriptions for this screen while selecting an item from the toolbar.

If the software is presently in 'lockout' mode (with only the status toolbar available), you'll be asked to login with your operator name and password when you click the toolbar.

Similarly, if you are not presently 'logged' into 'Control & Status', you'll be asked to enter your user ID and PIN.

### The Status Toolbar

- **Siren:** This button is shown in colour (and with a 'siren' sound) if any inputs set to trigger a 'siren' or 'sonalert' have been 'tripped' in an armed area (unless the alarm has been silenced). Clicking this button displays the Area status screen, allowing you to identify the alarm(s) quickly.
- **Fire:** This button is shown in colour if any "fire" inputs have been 'tripped' (e.g., by a smoke, fire, or CO detector). Clicking this button displays the Area status screen, allowing you to quickly identify the area(s) that may need to be evacuated.
- **Alarm:** This button is shown in colour if any input points (monitoring sensors) have been 'tripped' in an armed area. Clicking this button displays the Area status screen, allowing you to identify the alarm(s) quickly.
- **Trouble:** This button is shown in colour if any 'equipment' conditions are active (i.e., panel or module in trouble). Clicking this button displays the Equipment status screen, allowing you to locate the problem(s) quickly. If the 'trouble' button is flashing, this indicates that an AC-failure is in effect at the panel.
- **Monitor:** This allows selecting the account to be monitored by the status toolbar (for the operator who is presently logged in).
  (If you change this, you can save your changes by opening the **View** menu, selecting **Desktop Settings**, and then **Save**).

  The toolbar is active only when the MONITOR ISM Director software is connected with the associated panel(s).

  This does **not** effect the account to be monitored in the monitoring window. (The monitoring window pertains to the account that is selected (double-clicked) in the 'tree.)

## Selecting the Account to be Monitored by the Status Toolbar

For systems with multiple accounts, you can set the account to be monitored by the status toolbar (for each operator who is logged in):

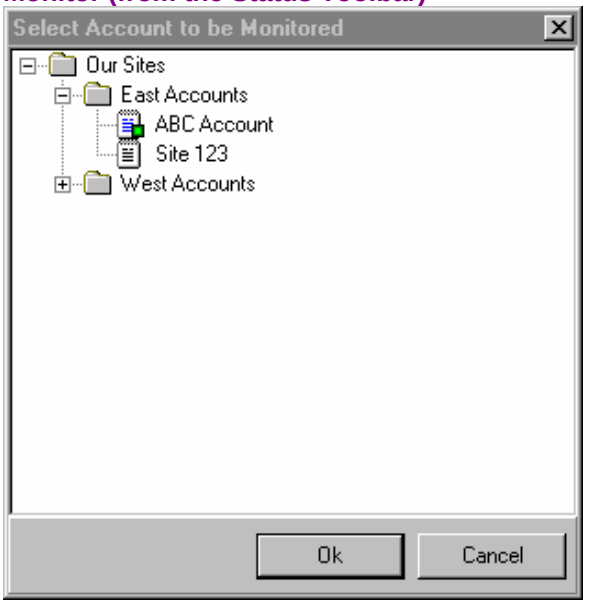
Click **Monitor** on the far-right end of the toolbar (or open the **View** menu, and select **Change Monitor Account**). Then, select your desired account, and click **OK**.

When finished, save your changes by opening the **View** menu, selecting **Desktop Settings**, and then **Save**.

This does **not** effect the account to be monitored in the monitoring window. (The monitoring window pertains to the account that is selected (double-clicked) in the 'tree.)

The status toolbar is active only when the MONITOR ISM Director software is connected with the associated panel(s).

### Monitor (from the Status Toolbar)




### (Account Folders and Accounts)

- The account to be monitored by the status toolbar (identified with a small green square).

Select the desired account, and click **OK**.

# Set the Panel Date/Time, Reset APB for Users, or Clear a Global Lockout

## Panel Date and Time

MONITOR ISM Director lets you check the date and time stored at a system panel, compare it with that at the host computer, and adjust the panel's date / time to match the computer, if necessary.

### Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - System** from the MyTools bar, **or** select **System** under Control & Status in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, and **Panel Control & Status** (click the "**+**" beside each topic).

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

When the screen appears, use the **Grid** / **Form** toolbar-button to select your preferred view-mode (forms view is recommended here).

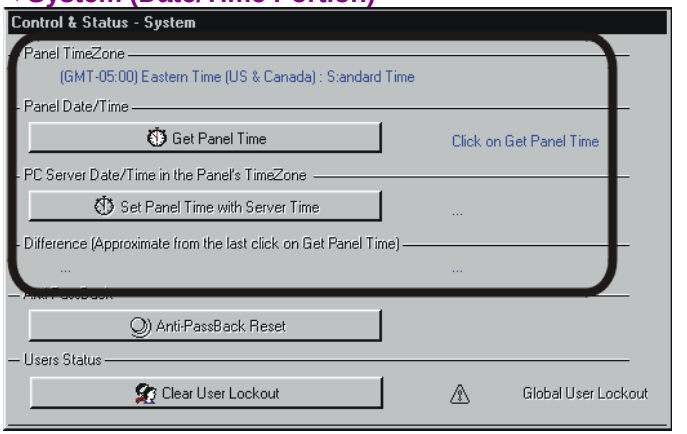
Multi-**Panel** Systems: Select the desired panel at the bottom of the form (if not shown/selected in the 'tree').

### Checking or Changing the Date / Time

To 'read' the date and time from the panel, click **[Get Panel Time]**. Then, check the 'difference' value to see if the panel date and time need to be changed.

If you need to set the date and time at the panel to match the MONITOR ISM Director computer, click **[Set Panel Time with Server Time]**.

## Control & Status ⇨Panel Control & Status ⇨System (Date/Time Portion)




- **Panel** (bottom of the form)**:** This is where you select a desired panel (for systems with more than one).

  Alternative: You can also set the 'tree' to list status topics on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

- **Panel Time Zone:** This shows the 'time zone' for the specific panel. If different from the PC/server time zone, any clock updates will be adjusted accordingly.

  This will be different from the PC/server time zone **only** for remote panels managed via modem or wide area network. The panel time zone is set through the panel-group screen. For details, refer to "Panel Groups and Connection Settings".

- **[Get Panel Time]:** Reads the date and time setting at the panel.
- **[Set Panel Time with Server Time]:** Changes the time at the panel to match the computer.

  Note: In multi-**PC** (client-server) systems, the panel time is synchronized with that of the MONITOR ISM Director server PC. Director-Server PC: This is the PC that includes "**...Director-Server.exe**", and typically contains the database as well.

- **Panel Date / Time:** The present date & time setting at the panel.
- **PC Server Date / Time:** The present date & time setting at the MONITOR ISM Director computer (server if applicable).
- **Difference (Approximate):** The approximate time-difference between the panel and the computer.

If necessary, you can set the date and time for the computer through the windows 'Control Panel' (select **Start**, **Settings**, **Control Panel**, and **Date/Time**). When finished, be sure to synchronize the panel clock (i.e., "**Set Panel Time...**").

# Resetting Users' Antipassback Status

Antipassback (APB): A feature that blocks individual cards from being used to:

+ Re-enter the same area, or;
+ Re-enter the facility from 'outside', and/or;
+ (Optional): Enter other areas;

**...Unless** they are recorded as exiting first--i.e., each person must use their card/token at every reader they encounter (that is set to "Detect Antipassback"). **Tip:** This helps to protect against unauthorized card usage.

Enabling the Antipassback Feature: To enable antipassback tracking for specific areas and doors, refer to the "Antipassback" selections under "Areas and Related Settings", and the "Detect Antipassback" selection under "Reader 1 & 2 Settings for a Door".

## Antipassback Reset

From time-to-time, a person may be unable to enter a door due to an antipassback violation (such as if they entered or exited when the system unlocked a door for someone else).

This can be corrected by resetting the antipassback status for the specific user, or all users, as desired.

Reset APB Status by Area: You can also reset user antipassback status on an area-by-area basis. For details, refer to "Checking Status or Controlling Items by Area" (in a following section).

## Resetting Antipassback Status

Initiate a connection with the panel(s), and access the "**System**" Control & Status topic as described previously/above.

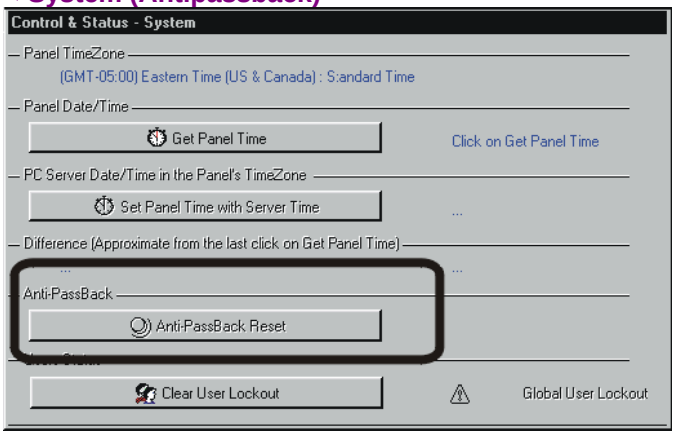
Multi-**Panel** Systems: Select the desired panel at the bottom of the form (if not shown/selected in the 'tree').

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

Then, click **[Anti-Passback Reset]**. In the next screen, select an individual user, or "All Users", and the panel(s) to be affected by the reset (i.e., the ones associated with the specific areas and doors).

When finished, click **OK**, and respond to any additional messages that appear.

## Control & Status ⇨Panel Control & Status ⇨System (Antipassback)




**-Panel** (bottom of the form)**:** This is where you select a desired panel (for systems with more than one).

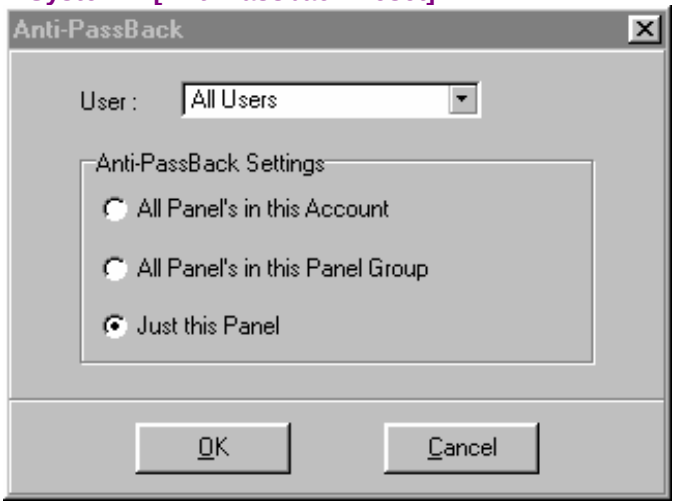
Alternative: You can also set the 'tree' to list status topics on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

### Anti-Passback

- **[Anti-Passback Reset]:** This opens a small screen that allows resetting the antipassback status for a single user, or all users for doors associated with selected panel(s).

---

## Control & Status ⇨Panel Control & Status ⇨System ⇨[Anti-Passback Reset]




**-User:** This allows selecting a specific user, or "All Users" to have their antipassback status reset at the selected panel(s).

### Anti-Passback Settings

These choices allow you to select the panels associated with the user APB status-reset (for systems that have more than one panel). (If you have only one panel, these settings all have the same effect.)

- **All Panels in this Account:** This will reset the antipassback status for all panels in your presently-selected account.
- **All Panels in this Panel Group:** This will reset the antipassback status for your selected panel, plus any others that communicate through the same cable or remote modem.
- **Just this Panel:** This will reset the antipassback status for your selected panel only.

# Clearing a "Bad Card/PIN Global Lockout"

## Global User Lockouts

The 'Bad Card/PIN' tracking feature helps to prevent unauthorized persons 'hacking' their way into a controlled area. All users can be locked out automatically if a lot of invalid cards and/or PINs are detected during a set time.

Related: • Account Information ⇨Bad Card/PIN🗀; • Configuration ⇨Areas ⇨Access🗀 ⇨"Bad Card Action"

The **[Clear User Lockout]** button allows clearing the lockout, so all authorized persons can enter as usual.

## Clearing a Global User Lockout

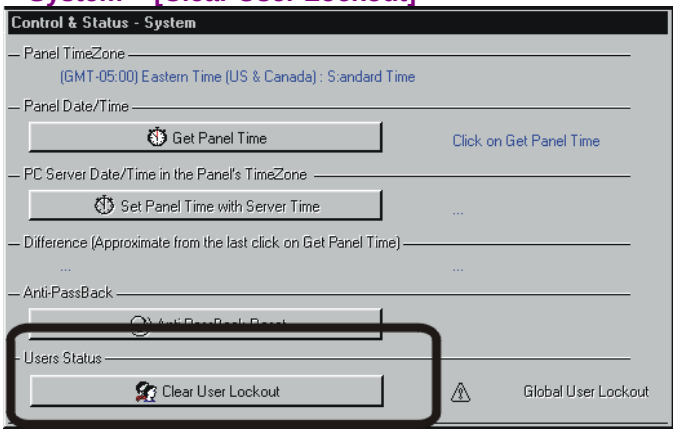
Initiate a connection with the panel(s), and access the "**System**" Control & Status topic as described previously/above.

Multi-**Panel** Systems: Select the desired panel at the bottom of the form (if not shown/selected in the 'tree').

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

Then, click **[Clear User Lockout]**, and watch for the status indicator to change.

## Control & Status ⇨Panel Control & Status ⇨System ⇨[Clear User Lockout]




- **Panel** (bottom of the form)**:** This is where you select a desired panel (for systems with more than one).

  Alternative: You can also set the 'tree' to list status topics on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

### User Status

- **[Clear User Lockout]:** This allows resetting a "Global User Lockout" triggered by the 'Bad Card/PIN' tacking feature.
- **Global User Lockout:** This shows whether or not a 'Global User Lockout' is presently in effect.

  Related: • Account Information ⇨Bad Card/PIN

# Checking the Status of Panels (Equipment)

## Panel Status (Equipment)

### Conditions Monitored for Each Panel

Various conditions (such as low battery, tampering, etc.) can be monitored for each panel. This helps to maintain the integrity of each system panel.

Items to be Monitored: To set the conditions to be monitored for a panel, refer to "Equipment Settings (Pseudo / Internal Inputs)".

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

### Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Equipment** from the MyTools bar, **or** select **Equipment** under "Control & Status: System" in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, **Panel Control & Status**, and **System** (click the "**+**" beside each topic).

Alternative: You can also click **Trouble** on the status toolbar.

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

### Working with This Screen

When the status screen appears, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: All equipment topics on a graphical screen;
Grid View: A list of monitored equipment topics.

Multi-**Panel** Systems: Select the desired panel at the bottom of the form (if not shown/selected in the 'tree').

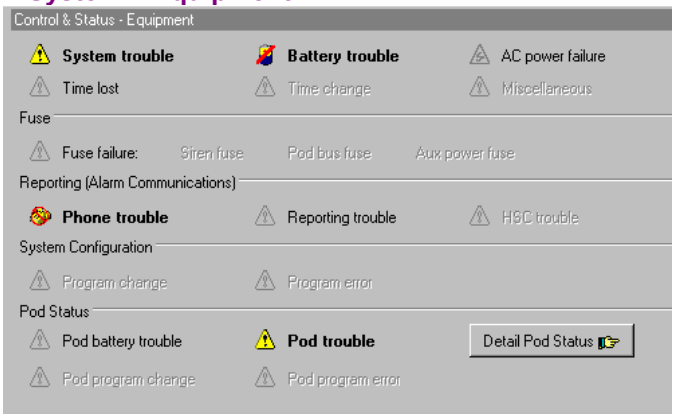
Then, refer to the selection-descriptions for this screen while viewing the available status information.

**Tip:** Any alarm conditions that are in effect will be shown in colour. **Be sure to dispatch someone to deal with any conditions that require attention**.

Individual items that are grey in colour are not presently being monitored by the system.

**To block the monitoring of a specific condition:** Go to "Configuration⇨System⇨Equipment" for the specific panel, and set the "Preprocess" for the desired item to "Undefined". For details, refer to "Equipment Settings (Pseudo/Internal Inputs)".

## Control & Status ⇨Panel Control & Status ⇨System ⇨Equipment




- **Panel** (bottom of the form)**:** This is where you select a desired panel (for systems with more than one).

  Alternative: You can also set the 'tree' to list status topics on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

- **(top of screen):** Status of various items pertaining to a specific account or site.
- **Fuse:** Whether any of the fuses on this system panel has failed.
- **Reporting (Alarm Communications):** Status of communications links (phone and high-security HSC line), and whether or not this has affected an alarm transmission.
- **System Configuration:** Panel programming issues/errors.
- **Module Status:** Items pertaining to an expansion module (door controller, point expansion module, etc.).
- **[Detail Module Status]:** Jumps to the module/POD status window (grid-view), so you can quickly locate the device that is in trouble.

# Checking the Status of Modules

## Module Status

The module status screen shows the status of various items pertaining to each system module (keypad, door controller, etc.).

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Modules** from the MyTools bar, **or** select **Modules** in the 'tree' under "Control & Status: System: Equipment".

**Using the Tree:** Click your site/account button in the tree, and then open these branches by clicking the "**+**" beside each topic: • **Control & Status**, • **Panel Control & Status**, • **System**, • **Equipment**.

Alternative: You can also select **[Detail Module Status]** in the equipment status screen.

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

## Working with This Screen

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one module at a time;
Grid View: All modules in a list.

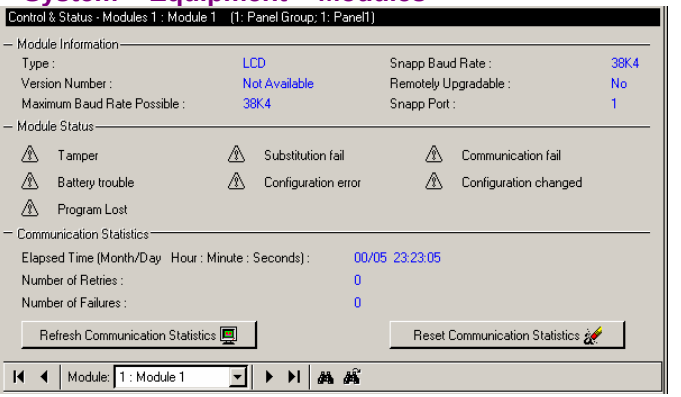
Select a desired module in the list.

**Tip:** In 'forms' view, you can select a module at the bottom of the form, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, refer to the selection-descriptions for this screen while viewing the available status information.

**Tip:** Any alarm conditions that are in effect will be shown in colour. Be sure to dispatch someone to deal with any conditions that require attention.

## Control & Status ⇨Panel Control & Status ⇨System ⇨Equipment ⇨Modules




- **Module** (bottom of the form)**:** This is where you select a module to view its status. This area shows a reference number assigned by the system, plus the name/description of the module as defined under 'Configuration'.
- **Module Information:** Information pertaining to the selected module (version number, maximum and present baud rate, etc.).
- **Module Status:** Various status topics for the selected module.
- **Communication Statistics:** This shows information pertaining to the module bus communications success rate with this device over a period of time.
- **[Refresh Communication Statistics]:** This updates the screen (i.e., rechecks communications statistics).
- **[Reset Communication Statistics]:** This restarts the counters ('i.e., resets the statistics values to zero).

# Checking the Status of a Suite Security System

## Status of an Apartment/Suite or Facility

The 'Suite Security' status screen shows the status of various items pertaining to each apartment or facility associated with a suite-security keypad (2-zone or 8-zone).

**Also See** (≥ V4.0)**:**
**+** Visual Status and Control (Maps and Cameras)
**+** To connect: "New Installation? Try the Wizard"

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Suite Security** from the MyTools bar, **or** select **Suite Security** under "Control & Status" in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, and **Panel Control & Status** (click the "**+**" beside each topic).

Login with your user ID and PIN if prompted for this.

Diagnostics Screen: A second screen is available as **Control & Status - Suite Security Diagnostics** in the MyTools bar, or **Diagnostics** under "Suite Security " in the 'tree'.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

## Working with These Screens

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one suite/facility at a time;
Grid View: All defined suites in a list.

Select a desired suite-security keypad in the list.

**Tip:** In 'forms' view, you can select a suite-security keypad at the bottom of the form, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*)

Then, refer to the selection-descriptions for this screen while viewing the status topics for the desired suite(s).

**Tip:** Active status items and available buttons are displayed in colour. **Be sure to dispatch someone to deal with any conditions that require attention**.

---

- **Security Suite** (bottom of form)**:** This is where you select a suite/facility to view the status of various items. This area shows a reference number assigned by the system, plus the name/description of the module as defined under 'Configuration'.
- **Security Suite State:** These buttons show the arming level of the suite security system: Off (Disarmed); Stay: (Perimeter Armed); or ON (Fully armed).

  **Note:** Since each keypad typically pertains to a separate, privately-owned dwelling, this screen does not allow changing the arming-state of a suite security system.
- **Alarms:** This area shows any alarms for the suite/facility (fire, tripped sensors, or someone tampering with the keypad). The "Siren Type" is indicated as well.
- **Input Points:** This area lists the suite security keypad's input points, and shows the status of each one (i.e., whether or not each sensor has been 'tripped').

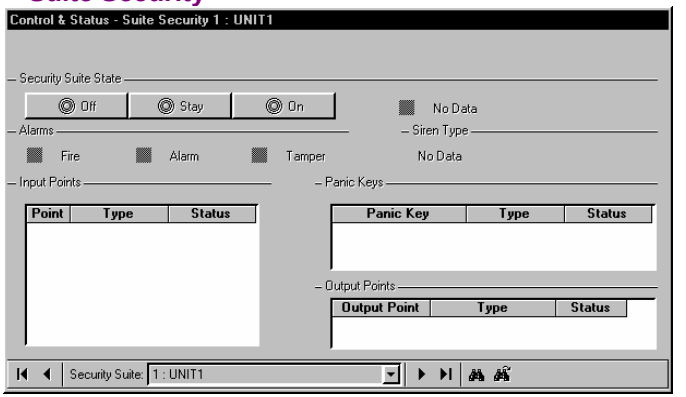
  Eight-zone keypads support 8 input points, while 2-zone keypads support inputs 1 and 2.

- **Panic Keys:** This area lists the suite security keypad's panic keys, and shows the status of each one (i.e., whether or not any panic keys have been pressed).

  Eight-zone keypads support 3 panic keys, while 2-zone keypads support panic key #1 only (triggered by pressing # and * ).
- **Output Points:** This area lists the suite security keypad's outputs, and shows the status of each one (i.e., whether or not any of the outputs have been fired).

  Eight-zone keypads support 2 programmable outputs, while 2-zone keypads support output #1 only.

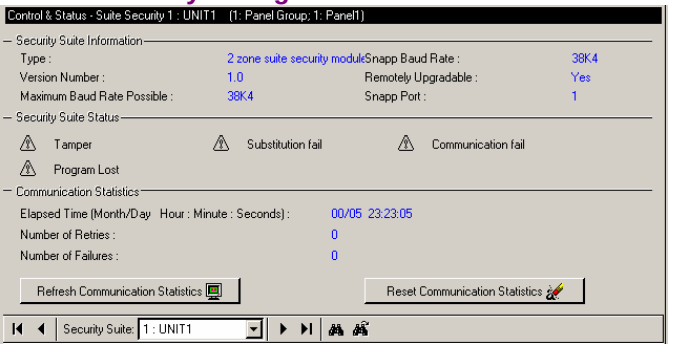
## Control & Status ⇨Panel Control & Status ⇨Suite Security




---

- **Security Suite** (bottom of form)**:** This is where you select a suite security keypad to view diagnostic information. This area shows a reference number assigned by the system, plus the name/description of the suite/facility as defined under 'Configuration'.
- **Security Suite Information:** Information pertaining to the selected suite (version number, maximum and present baud rate, etc.).
- **Security Suite Status:** Various status topics for the selected keypad.
- **Communication Statistics:** This shows information pertaining to the module bus communications success rate with this device over a period of time.

## Control & Status ⇨Panel Control & Status ⇨Suite Security ⇨Diagnostics




- **[Refresh Communication Statistics]:** This updates the screen (i.e., rechecks communications statistics).
- **[Reset Communication Statistics]:** This restarts the counters ('i.e., resets the statistics values to zero).

# Checking Status or Controlling Items by Area

"Area Users" Screen: A second screen is available as Control & Status - Area Users in the MyTools bar, or Area Users under "Areas " in the 'tree'. This pertains to the presence of user activity, the number of users in an area (user count), and resetting APB tracking for an area. Related Topic: Area Users (to follow).

## Control & Status by Area

The area status screen shows the status of items associated with each system 'Area', and allows controlling many things (arm or disarm an area, unlock doors, etc.)

Permissions/Authorities: This feature can be used by operators with "Control and Status" permission, when they log into 'Control & Status' as a **user** with the authority to perform the specific tasks.

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Areas** from the MyTools bar, **or** select **Areas** under "Control & Status" in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, and **Panel Control & Status** (click the "**+**" beside each topic).

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

## Viewing the Status of an Area

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode ('forms' view is recommended here).

Select a desired Area in the list.

**Tip:** In 'forms' view, you can select an item at the bottom of the form, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, refer to the selection-descriptions for this screen while viewing the status topics for items in the desired area.

**Silencing Alarms:** You can use the **[Silence]** button to silence an alarm that is presently in effect (if you have this authority).

**Tip:** Active status items and available buttons are displayed in colour, and door and input-point alarms are shown in **red** at the bottom of the form. **Be sure to dispatch someone to deal with any conditions that require attention**.

## Arming or Disarming an Area

While 'in' the area status screen, you can change the 'arming level' of a desired area by:

- Selecting the desired area, and;
- Clicking **[Off]**, **[Stay]**, or **[On]**, as applicable (and wait briefly for the change to occur).

**Arming Wizard:** If the area has an open door, or input point that is 'in alarm', you will be prompted to deal with this before finishing the area arming-change.

Bypassing a Sensor: For details on bypassing a sensor (input-point), refer to "Checking Status or Bypassing Input Points (Sensors)".

Areas can be set to disarm to either 'Off' or 'Stay' automatically when a user/entrant is granted access at a door in that area. This is set up jointly under "Areas and Related Settings", and "Authorities for Users/Entrants".

## Extending / Suspending an Area Schedule

You can suspend an area's schedule, or set/delay the closing time (Worklate) when necessary. To suspend or resume the schedule, select the desired Area, and click **[Suspend]** or **[Resume]** as applicable. To adjust the closing time, click **[Worklate]**, set the closing time as desired, and click **OK**.

**Tip:** To adjust the time in 30 min. increments, use '**<**' or '**>**' respectively. For 1 hour adjustments, use '**<<**' or '**>>**'.

For more permanent changes, you can adjust the schedule itself, and/or change assignments for the specific area.

For details, refer to "Schedules for User Access and Area Automation", and "Areas and Related settings".

## Controlling all Doors in a Specific Area

**Tip:** Reader commands pertain to the readers that allow entering the selected area.

- Ensure you are in the 'Forms' view (click **Form** on the toolbar);
- Select the desired area (bottom of window);
- Use one of the four buttons in the centre of the screen to select your desired action. Refer to the selection-descriptions if you'd like more information. (And wait while the changes take effect).

Elevator Readers: These commands do **not** apply to readers in elevator (lift) cabs. To control an elevator and/or its associated reader, refer to "Checking Status or Controlling Elevators".

## Controlling a Door in a Specific Area

- Ensure you are in the 'Forms' view (click **Form** on the toolbar);
- Select the desired "Area" (bottom of window), and locate the specific door in the list;
- Find your desired door in the list near the bottom left corner of the screen. Then, click the small button in the 'state' column for the door, and select from the list that appears. (Wait briefly for any changes to take effect).

If the button is not present, this means you do not have 'Door Control' authority. If card-access is presently 'locked-out', you may need to use an 'area-wide' command to reinstate card-access before the door can be unlocked. Locking-out cards automatically causes the door to lock.

Doors can be set to unlock and re-lock at certain times and/or in-sync with the arming state for the associated area. For details, refer to "Areas and Related Settings", and "Doors, Readers, and Related Settings".

## Bypassing an Input Point in a Specific Area

To bypass an input point in a specific area, allowing the area to be armed, or remove a 'bypass', allowing the sensor to be monitored:

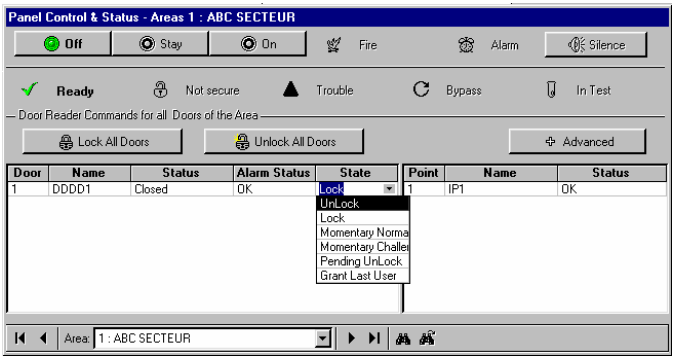
- Ensure you are in the 'Forms' view (click **Form** on the toolbar);
- Select the desired area (bottom of window), and locate the specific input-point in the list;
- Click the small button on the right of the input-point status, and select from the list that appears. (Wait briefly for the change to take effect).

If the button is not present, this means either that the input-point is not of a 'bypassable' type, or you do not the authority to bypass input-points.

A user's authorities can be set to automatically remove any 'bypasses' that are in effect when they enter an area (to help ensure that any faulty sensors are not forgotten). For details, refer to the "Auto Remove Bypass" setting under "Authorities for Users/Entrants".

( ⇨ )

## Control & Status ⇨Panel Control & Status ⇨Areas




- **Area** (bottom of form)**:** This is where you select an area to view its status or control items. This shows a reference number assigned by the system, plus the name/description of the area as defined under 'Configuration'.
- **[Off]**, **[Stay]**, and **[On]:** These buttons indicate the present arming-level of the area, and allow arming/disarming an area as desired (if you have this authority). **Note:** If an item is in 'alarm' or 'trouble', this should be corrected before you proceed. (The system will typically prompt you to deal with the situation).
- **Fire / Alarm:** Whether or not any fire-type inputs and/or other inputs in the area have been 'tripped'.

  **[Silence]:** This allows silencing alarms that are in effect as desired—if you have this authority.
- **Ready, etc.:** Various misc. status aspects for the specific area (if the area is ready to be armed, or if doors are open, etc.).
- **Schedule-Related Items** (visible only for a scheduled area)**:** This shows schedule-related status topics, and provides buttons to set/delay the closing time **[Work Late]**, or **[Suspend]** (or Resume) the schedule (if you have the authority).
- **Door Reader Commands for all Doors of the Area** (3 buttons across the middle)**:** Allows controlling **all** doors in the selected area (if you have the authority).

  **[Lock All Doors]:** This locks / re-locks all doors pertaining to the selected area (i.e., all doors with one of its readers set to this area);

  **[Unlock All Doors]:** This unlocks all doors pertaining to the selected area (i.e., all doors with one of its readers set to this area);

  **[Advanced]:** This button provides access to additional reader/door commands. Selections include unlock/relock the doors, lockout or reinstate card access, and/or change various modes at the doors.

  "Momentary" pertains to the defined "Unlock Duration" (such as when a person uses their access card), and "Pending" means the command will be held until after one valid user gains entry at the door.

  Reader commands pertain to all readers that allow entering (or remaining within) the specific area.

  Readers that allow exiting from the area will be set to either a different area, or "outside".

  For details on the various reader modes, card modes, and class map settings, refer to "Doors, Readers, and Related Settings".

  Elevator Readers: These commands do **not** apply to readers in elevator (lift) cabs. To control an elevator and/or its associated reader, refer to "Checking Status or Controlling Elevators".
- **Door List:** Shows the status of doors in the area, and provides selections for unlocking or relocking individual doors (if you have the authority).

  Pending Unlock: This is an "unlock" that waits until someone gains entry at the specific door.
- **Input Point List:** Shows the status of input points (sensors) in the area, and allows bypassing individual sensors in each area (for points that support this, and if you have the authority).

The Door-List and Input-Point List are available only in 'forms' view (click **Form** on the toolbar to switch to 'forms' view).

# Area Users (Activity, User Count, and APB-Reset)

## Control & Status - Area Users

The "Area Users" screen shows / allows:

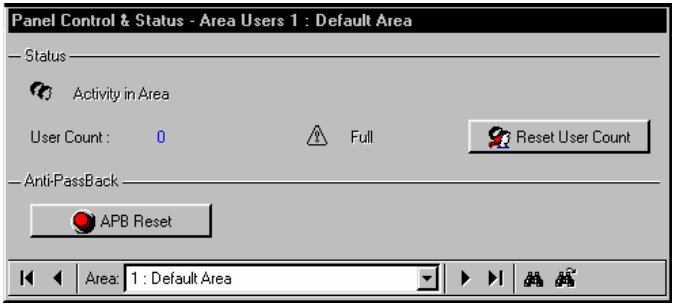
- Whether or not activity has occurred in the area.
  (This is based on users entering or leaving the area, and/or a custom 'Activity Monitor' input point being tripped.)
- The number of users presently in the area;
- Whether or not the area is full (i.e., contains the 'allowed' number of persons/vehicles).
- Allows resetting the 'user-count' as desired
  (to min/empty, max. allowed, or any custom value);
- Allows resetting the antipassback (APB) status for all users in an area (see next section).

Note: To be available here, the 'user-counting' and 'activity tracking' features must have been set up for the specific area(s).
Ref: "Configuration ⇨Areas" (Counting🗀; Activity🗀).

## Working with this Screen

- Ensure you are connected with the specific panel(s) as described previously.
- Open the **Area Users** screen:
  MyTools Bar: **Control & Status - Area Users**
  Tree: Control & Status, ⇨Panel Control & Status, ⇨Areas, ⇨**Area Users**
- Use the **Grid** / **Form** toolbar-button to select your preferred view-mode;
- Refer to the selection-descriptions for this screen while viewing the status topics for items in the desired area.

## Control & Status ⇨Panel Control & Status ⇨Areas ⇨Area Users




- **Area** (bottom of form)**:** This is where you select an area to view its status or control items. This shows a reference number assigned by the system, plus the name/description of the area as defined under 'Configuration'.

### Status

- **Activity in Area:** Whether or activity has occurred in the specific area. (This is based on users entering or leaving the area, and/or a custom 'Activity Monitor' input point being tripped.)
- **User Count:** This is the number of users (or vehicles) in the area (based on access granted in to and out of the area).

  Full: Whether or not the area contains the allowed number of users/vehicles.
- **[ Reset User Count ]:** This allows resetting this area's user-count as desired. (Details to follow / below.)

### Anti-Passback

- **[ APB Reset ]:** This allows resetting the antipassback status pertaining to the selected area, for **all** users. (Details to follow / below.)

### Resetting the User-Count for an Area

For areas set to 'count' the number of users that are present, you may need to reset the 'user-count' on a periodic basis (e.g., to correct for things such as users entering and/or exiting when someone else opens the door).

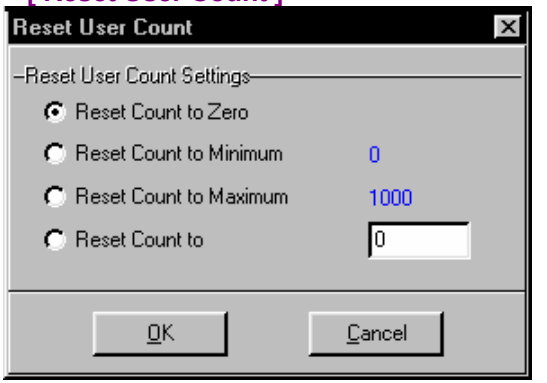
Related Topic: "Configuration ⇨Areas ⇨Counting🗀.

To reset the 'user-count' for an area:

- Ensure you are connected with the specific panel(s) as described previously.
- Open the **Area Users** screen:
  MyTools Bar: **Control & Status - Area Users**
  Tree: Control & Status, ⇨Panel Control & Status, ⇨Areas, ⇨**Area Users**
- Access the "Reset User Count" feature for an area:
  Forms View: Select the desired area at the bottom of window, and then click **[ Reset User Count ]**.
  Grid View: Locate your desired area in the list, and click **[...]** under "User Count".
- Refer to the item-descriptions for this screen while making your selection.

---

**Control & Status ⇨Panel Control & Status ⇨Areas ⇨Area Users ⇨[ Reset User Count ]**




- **Reset Count to Zero:** This resets the area user-count to zero (regardless of what the present 'minimum' value is);
- **Reset Count to Minimum:** This resets the area user-count to the present 'minimum' value (as shown in blue). This is the maximum number of users that can be in the area for it to still be considered 'empty';
- **Reset Count to Maximum:** This resets the area user-count to the present 'maximum' value (as shown in blue). This is the number of users needed for the area to be considered 'full';
- **Reset Count to:** This allows resetting the user-count to any value between the 'minimum' and 'maximum' values shown in blue.

## Resetting the Antipassback Status for Users in a Specific Area

From time-to-time, persons may be unable to enter an area due to an antipassback violation (such as if they entered or exited when the system unlocked a door for someone else).

This can be corrected by resetting the antipassback status for a specific area.

- Ensure you are connected with the specific panel(s) as described previously.
- Open the **Area Users** screen:
  MyTools Bar: **Control & Status - Area Users**
  Tree: Control & Status, ⇨Panel Control & Status, ⇨Areas, ⇨**Area Users**
- Access the "APB Reset" feature for an area:
  Forms View: Select the desired area at the bottom of window, and then click **[ APB Reset ]**.
  Grid View: Locate your desired area in the list, and click **[...]** under "Anti-Passback Reset".
- Respond to any additional messages that appear.

**Control & Status ⇨Panel Control & Status ⇨Areas ⇨Area Users ⇨[ APB Reset ]**

Antipassback (APB): A feature that blocks individual cards from being used to:

+ Re-enter the same area, or;
+ Re-enter the facility from 'outside', and/or;
+ (Optional): Enter other areas;

**…Unless** they are recorded as exiting first--i.e., each person must use their card/token at every reader they encounter (that is set to "Detect Antipassback"). **Tip:** This helps to protect against unauthorized card usage.

Resetting APB Status for an **Individual** and/or **System-Wide**: You can also reset the antipassback status for an individual and/or for all areas associated with selected panel(s). For details, refer to "Resetting Users' Antipassback Status" (previous). Enabling the Antipassback Feature: To enable antipassback tracking for specific areas and doors, refer to the "Antipassback" selections under "Areas and Related Settings", and the "Detect Antipassback" selection under "Reader 1 & 2 Settings for a Door".

# Checking User In/Out Status

## User In/Out Status

Beginning with v4.2, MONITOR ISM Director can show the In/Out status for all users in an account.

This feature operates in 'real-time', showing the new area and time whenever a person is granted access (for panels that are presently communicating with the MONITOR ISM Director software).

**Note:** This feature requires entry and exit readers on all doors used to enter and exit from the facility, and every person must use their access card/token when entering or leaving the building. Persons last reported as 'In', but with no card activity for 24 hours will be set as 'Out'.

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - User In/Out Status** from the MyTools bar, **or** click your site/account button in the tree, 'open' **Control & Status** (click the "+"), and select **User In/Out Status** .

Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Note: This feature uses a custom 'view', with the Form/Grid toggle feature disabled.

## Working with This Screen

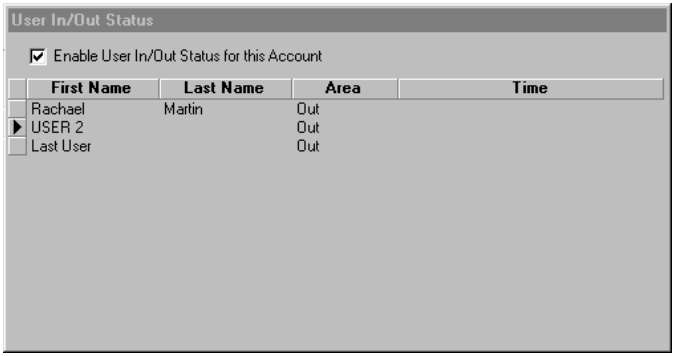
Refer to the selection-descriptions for this screen while viewing the available status information.

Tip: To sort the list by name, area, or time, click the desired column name.

**Note:** Especially with area or time, be sure to sort the list fairly often to update the sort-order. (The data is live, the sorting is not.)

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

## Control & Status ⇨User In/Out Status




- **Enable User In/Out Status for this Account:** Select this to see a list of all users for this account along with the In/Out status for each one.

  Notes: This feature operates in 'real-time', updating each time a person uses their card to gain entry through a door or gate. The screen may take a little while to activate/update.

- **(List of Users):** Once enabled, the main part of this screen shows a list of the users for this account that are inside the facility. The list will include each person's first name, last name, the last area they entered, and the time of entry.

  Tip: To sort the list by name, area, or time, click the desired column name. Especially with area or time, be sure to sort the list fairly often to update the sort-order. (The data is live, the sorting is not.)

# Checking Status or Controlling Individual Doors

## Door Status and Control

The door status screen shows the status of doors in the system, and allows controlling various parameters for each door (unlock a door, change operating characteristics, etc.)

Elevator Readers: Door control does **not** apply to readers in elevator (lift) cabs. To control an elevator and/or its associated reader, refer to "Checking Status or Controlling Elevators".

Permissions/Authorities: This feature can be used by operators with "Control and Status" permission, when they log into 'Control & Status' as a **user** with the authority to control the specific items.

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Doors** from the MyTools bar, **or** select **Doors** under "Control & Status" in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, and **Panel Control & Status** (click the "**+**" beside each topic).

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

## Viewing the Status of Specific Doors

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one door at a time;
Grid View: All defined doors in a list.

Now, select a desired door in the list.

**Tip:** In 'forms' view, you can select an item at the bottom of the form, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, refer to the selection-descriptions for this screen while viewing the status topics for the desired door(s).

**Tip:** Active status items, and available buttons are displayed in colour. **Be sure to dispatch someone to deal with any conditions that require attention**.

## Controlling a Specific Reader or Door

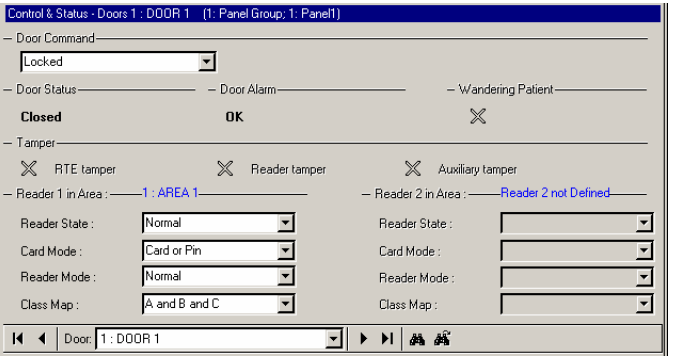
To unlock or re-lock a door, or change one of its operating parameters:

- Select the desired door (forms view: bottom of the window);
- Then select the desired command from one of the drop-down lists on the screen.

In 'Grid' view, use the small button to the right of your desired topic to select a command.

If button(s) are not available, this means you do not have 'Door Control' authority. If cards are presently 'locked-out', you'll need to reinstate card-access before unlocking the door. Locking-out cards automatically causes the door to lock.

Doors can be set to unlock and relock at certain times and/or in-sync with the arming state for the associated area. For details, refer to "Areas and Related Settings", and "Doors, Readers, and Related Settings".




- **Door** (bottom of form)**:** This is where you select a door to view its status or issue commands. This shows a reference number assigned by the system, plus the name/description of the door as defined under 'Configuration'.

  If some Door numbers are missing: Elevator and door numbering is shared (1 - 32), but the elevators will not be listed here.

- **Door Command:** Shows the status of the selected door, and provides selections for unlocking/relocking it (if you have the authority).

  If cards are presently 'locked-out', you'll need to reinstate card-access before unlocking the door. (Set the "Reader State" as "Normal".)

  **Tip:** "Momentary" pertains to the defined "Unlock Duration" (such as when a person uses their access card), and "Pending" means the command will be held until after one valid user gains entry at the door.

- **Door Status, Door Alarm**, and **"Wandering Patient":** The present status of the door, and whether or not this is considered to be an 'alarm' (i.e., 'not OK'), plus whether or not the "wandering Patient" feature is in effect for this door.

- **Tamper:** Whether or not tampering has been detected for the RTE (REX) circuit, the main reader, or the auxiliary reader.

- **Reader 1 / Reader 2 In Area X:** Status topics for the selected reader and its associated area, plus selections for controlling each reader (if you have the authority). Selections include lockout or reinstate card access, and/or change various operating characteristics.

  Locking-out cards automatically causes the door to lock.

  For details on the various modes and commands:

  - In the section on using maps and cameras, see: "Controlling an Area or Device" (look for "Door Commands", and/or;
  - In the configuration chapter, see: "Doors, Readers, and Related Settings".

# Checking Status or Controlling Elevators

## Elevator (Lift) Status and Control

The elevator status screen shows the status of elevators in the system, and allows changing the operating characteristics for elevator readers. Selections are also provided to apply or remove access-control for all floors or individual floors--as accessed from a specific elevator (lift) cab.

Permissions/Authorities: This feature can be used by operators with "Control and Status" permission, when logged into 'Control & Status' as a **user** who has "door command" authority, and will affect only the floors they have the authority to access.

**Tip:** You can also secure or desecure floors as accessed from **all** elevator (lift) cabs. For details, refer to "Viewing Status or Controlling Floors".

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

### Status/Command Reference:

**Secure** (controlled access): Access to the floor (or all floors from this cab) is controlled (i.e., the floor call-button(s) are initially **de**-activated). To access the floor(s), persons with appropriate authority must present their access card and/or enter their PIN.

**Desecure** (free access): Access to the floor (or all floors from this cab) is NOT controlled (floor call-button(s) are activated).

**Partially De/secured:** Floors that presently have free access through some elevator (lift) cabs, while access is controlled though some other cabs (and/or where some floor relays are offline, and the status isn't known).

**Return to Auto:** This re-applies any defined scheduling for the elevator and its associated floor-access.

**Offline:** This indicates a relay board that is unable to communicate with the elevator controller.

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Elevators** from the MyTools bar, **or** select **Elevators** under "Control & Status" in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, and **Panel Control & Status** (click the "**+**" beside each topic).

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

## Viewing the Status of Specific Elevators

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode. (Forms view is recommended here.)

Now, select a desired elevator in the list.

**Tip:** In 'forms' view, you can select an item at the bottom of the form, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, refer to the selection-descriptions for this screen while viewing the status topics for the desired elevator(s).

**Tip:** Active status items, and available buttons are displayed in colour. **Be sure to dispatch someone to deal with any conditions that require attention**.

## Secure/Desecure Floors, or Control Access Requirements for an Elevator (Lift) Cab

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode. (Forms view is recommended here.)

Select the desired elevator (forms view: bottom of the window).

Refer to the item-descriptions for this screen while selecting your desired command:

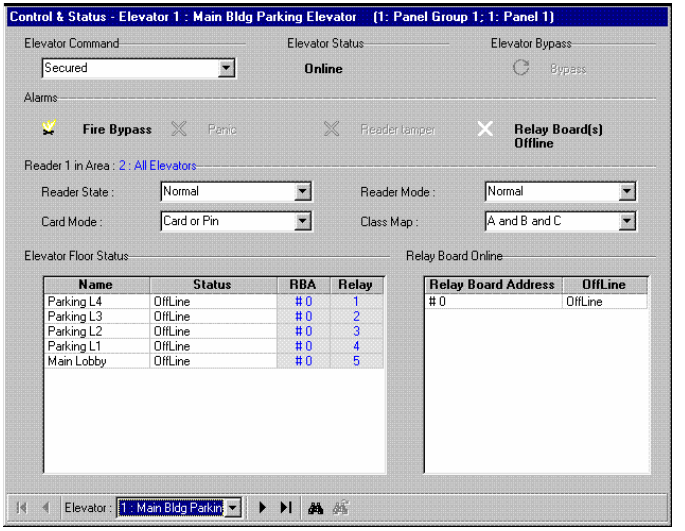
- To apply or remove access-control for all floors from this elevator cab, refer to the "Elevator Command" selections.
- To change the reader access requirements or operating characteristics, refer to the "Reader 1 in Area X" selections.
- To apply or remove access-control (secure or desecure) for an individual floor--as accessed from a specific cab, refer to the "Elevator Floor Status" selections.

In 'Grid' view, use the small button to the right of your desired topic to select a command.

If commands or button(s) are not available, this means you do not have the authority to control elevators.

Elevators and/or specific floors can be set to desecure and resecure in-sync with a desired schedule. For details, refer to the configuration topic for elevators and/or floors.

## Control & Status ⇨Panel Control & Status ⇨Elevators




- **Elevator** (bottom of form)**:** This is where you select an elevator to view its status or issue commands. This shows a reference number assigned by the system, plus the name/description of the elevator as defined under 'Configuration'.

  If some Elevator numbers are missing: Elevator and door numbering is shared (1 - 32), but the doors will not be listed here.
- **Elevator Command:** Shows the status of the selected elevator, and provides selections to secure or de-secure all floors as accessed from this elevator cab only (via appropriate authority).
- **Elevator Status**, and **Elevator Bypass:** These areas show the basic status of the selected elevator (lift) cab, and whether or not the manual override (bypass) input has been tripped.

  Manual Override (bypass) Input: Triggering the manual override (bypass) input on the elevator controller (typically connected through a key-switch) will desecure all floors as accessed from this cab (this is the same as selecting "desecure" for the elevator command).
- **Alarms:** This area shows the status of various alarm conditions (inputs) for the specific elevator controller, plus whether or not the relay boards are communicating (on-line).

  Fire Bypass: This indicates if a fire has been detected (i.e., whether or not the fire input has been tripped).

  Panic: This pertains to an "emergency" call-button in the elevator (lift) cab.
- **Reader 1 in Area X:** This shows status topics for the selected elevator reader, and provides selections for controlling it (if you have the authority). Selections include lockout or reinstate card access, and/or change various operating characteristics.

  For details on the various reader modes, card modes, and class map settings, refer to the elevator configuration topic.
- **Elevator Floor Status:** This area shows a list of the controlled floors that can be accessed through this elevator (lift) cab, plus the status of each floor, and provides selections to secure or desecure each floor (as accessed from this elevator / lift cab).

  RBA and Relay: This identifies the elevator controller relay associated with the specific floor (Relay Board Address 0 - 15, and Relay 1 - 8).
- **Relay Board Online:** This lists the floor-relay board(s) for your selected elevator (lift) cab, and indicates any that are offline.

# Checking Status or Controlling Floors

## Floor Status and Control

The floor status screen shows the status of access-controlled floors in the system, and allows applying or removing access-control for specific floor(s)--as accessed from all elevator (lift) cabs in the system.

Permissions/Authorities: This feature can be used by operators with "Control and Status" permission, when logged into 'Control & Status' as a **user** who has "door command" authority, and the ability to access the specific floors.

**Tip:** You can also secure or desecure all floors as accessed from a specific elevator (lift) cab. For details, refer to "Viewing Status or Controlling Elevators".

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

### Status/Command Reference:

**Secure** (controlled access): Access to the floor is controlled (i.e., elevator floor call-button(s) are initially **de**-activated). To access the floor, persons with appropriate authority must present their access card and/or enter their PIN.

**Desecure** (free access): Access to the floor is NOT controlled (elevator floor call-buttons are activated).

**Partially De/secured:** Floors that presently have free access through some elevator (lift) cabs, while access is controlled though some other cabs (and/or where some floor relays are offline, and the status isn't known).

**Return to Auto:** This re-applies any defined scheduling for the specific floor (as accessed from all elevator cabs).

**Offline:** This indicates that a relay board is unable to communicate with the elevator controller (or the elevator controller module has lost communications with the panel).

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Floors** from the MyTools bar, **or** select **Floors** under "Control & Status" in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, and **Panel Control & Status** (click the "**+**" beside each topic).

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

Note: Grid view does not apply to this topic.

## Viewing the Status of Controlled Floors

Access the "Floor" status topic as described previously/above.

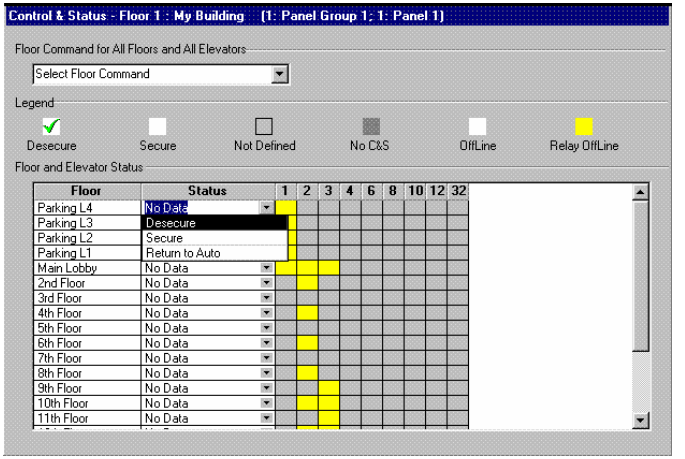
Then, visually skim through the list of floors to find your desired one(s). (For details on the displayed information, refer to the selection-descriptions for this screen.)

Tip: If floor relays are off-line, be sure to dispatch someone to correct the problem.

## Secure/Desecure Floors (Remove or Apply Access-Control to Floor(s)

Access the "Floor" status topic as described previously/above.

## Control & Status ⇨Panel Control & Status ⇨Floors




Then, refer to the item-descriptions for this screen while selecting your desired command:

- To apply or remove access-control for **all** floors as accessed from **all** elevator (lift) cabs, refer to the "Floor Command for All Floors and All Elevators" selections.
- To apply or remove access-control for (i.e., secure or desecure) an individual floor--as accessed from **all** elevator (lift) cabs, refer to the "Floor and Elevator Status" selections.

If commands or button(s) are not available, this means you do not have the authority to control elevators.

Elevators and/or specific floors can be set to desecure and resecure in-sync with a desired schedule. For details, refer to the configuration topic for elevators and/or floors.

- **Floor Command for All Floors and All Elevators:** This allows applying or removing access-control for all floors and all elevators at the same time (requires appropriate authority).
- **Legend:** This shows what the various colours can mean pertaining to floor and elevator status.

  No C&S: This means that no status information is available because you are not connected to the specific panel (i.e., a different panel within a multi-panel account).
- **Floor and Elevator Status:** This area shows a list of all controlled floors in the system, plus the status of each floor, and provides selections to secure or desecure each floor (as accessed from all elevator / lift cabs in the system).

  Elevator (lift) numbers (1 - 32): These columns indicate the status of the associated floor selection relay for each individual elevator (lift) cab.

  Tip: If floor relays are off-line, be sure to dispatch someone to correct the problem.

# Checking Status or Bypassing Input Points (Sensors)

## Status of Monitored Sensors (Input Points)

The 'point' status screen shows the status of monitored sensors, and lets you bypass a faulty sensor to allow arming an area.

Permissions/Authorities: This feature can be used by operators with "Control and Status" permission, when they log into 'Control & Status' as a **user** with the authority to bypass input points.

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Points** from the MyTools bar, **or** select **Points** under "Control & Status" in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, and **Panel Control & Status** (click the "**+**" beside each topic).

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

## Viewing the Status of a Specific Sensor

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one sensor at a time;
Grid View: All defined sensors in a list.

Select a desired sensor (input-point) in the list.

**Tip:** In 'forms' view, you can select an item at the bottom of the form, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, refer to the selection-descriptions for this screen while viewing the status topics for the desired input point(s).

**Tip:** Active status items, and available button(s) are displayed in colour. **Be sure to dispatch someone to deal with any conditions that require attention**.

## Bypassing a Specific Input-Point

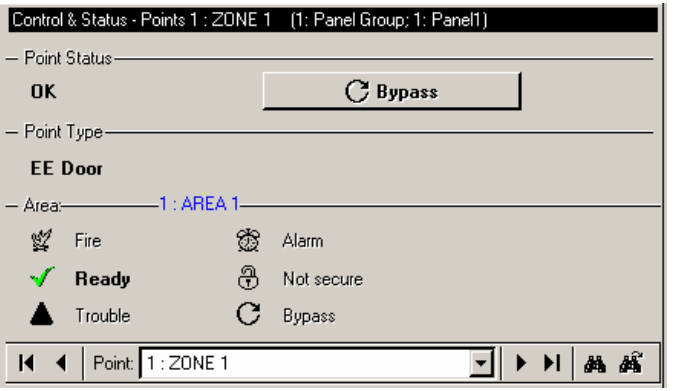
To bypass a specific input-point, allowing its area to be armed, or remove a 'bypass', allowing the sensor to be monitored:

- Select the desired input-point (bottom of the 'forms' window);
- Click **[Bypass]** or **[Remove Bypass]** as applicable;

If the button is not present, this means either that the input-point is not of a 'bypassable' type, or you do not the authority to bypass input-points.

A user's authorities can be set to automatically remove any 'bypasses' that are in effect when they enter an area (to help ensure that any faulty sensors are not forgotten). For details, refer to the "Auto Remove Bypass" setting under "Authorities for Users/Entrants".

## Control & Status ⇨Panel Control & Status ⇨Points




- **Point** (bottom of form)**:** This is where you select an input-point to 'bypass', or view its status. This shows a reference number assigned by the system, plus the name/description of the input-point as defined under 'Configuration'.
- **Point Status:** The present status of this sensor (input-point).
- **[Bypass]** or **[Remove Bypass]:** Allows bypassing this input-point (to allow its area to be armed), or removing the bypass (to allow this sensor to be monitored). This is allowed only if you have the appropriate authority, and if the input-point is 'bypassable'.
- **Point Type:** The type of the input-point (as selected under 'Configuration').
- **Area (and Related Information):** The area associated with this input-point, and various status topics pertaining to that area.

# Checking Status or Controlling Outputs (Electronically switched Devices)

## The 'Outputs' Control & Status Screen

Outputs allow turning a self-powered electronic device on or off. The outputs control & status screen allows viewing the status of programmable outputs, and lets you control them manually when necessary.

Permissions/Authorities: This feature can be used by any operator with "Panel Control and Status" permission.

**Also See** (≥ V4.0)**:**

**+** Visual Status and Control (Maps and Cameras)

**+** To connect: "New Installation? Try the Wizard"

## Initiate a Connection, and Access this Topic

See if you're already connected with the panel(s) by checking the status bar at the bottom of the monitoring window.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If not presently connected, initiate a connection with the desired panel(s).

For details, refer to "Connecting to the Associated Panel(s), An Overview" (under "Checking Status & Controlling Items", previous).

---

Then, select **Control & Status - Outputs** from the MyTools bar, **or** select **Outputs** under "Control & Status" in the 'tree'.

**Using the Tree:** Click your site/account button in the tree, and open **Control & Status**, and **Panel Control & Status** (click the "**+**" beside each topic).

Login with your user ID and PIN if prompted for this.

Panel Groups and Panels: Open your specific panel group and panel if these are listed in the 'tree'. Tip: The 'tree' can be set to show Control & Status topics in a single list (logical tree view), or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

If the status screen is blank or inactive (or if you'd like more information), refer to "Accessing the Control and Status Topics for a Panel" (under "Checking Status & Controlling Items", previous).

## Viewing the Status of a Specific Output

Use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one output at a time;
Grid View: All defined sensors in a list.

Select a desired output in the list (i.e., horn circuit or controlled device).

**Tip:** In 'forms' view, you can select an item at the bottom of the form, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, refer to the selection-descriptions for this screen while viewing the status topics for the desired output(s).

**Tip:** Active status items, and available button(s) are displayed in colour. **Be sure to dispatch someone to deal with any conditions that require attention**.

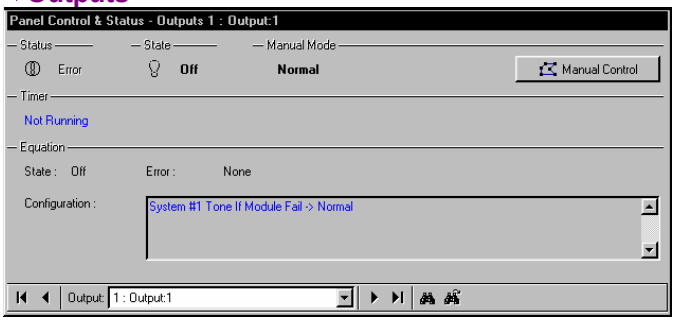
---

- **Output** (bottom of form)**:** This is where you select an output to control manually, or view its status. This shows a reference number assigned by the system, plus the name/description of the output as defined under 'Configuration'.
- **Status:** "Error" will appear in colour for things such as:
  - Output programming done incorrectly at a keypad;
  - An output equation that is not supported by the panel version;
  - An output equation that is referencing undefined or non-supported devices (e.g., incompatible feature-set value).
- **State:** This shows whether or not the output is triggered;
- **Manual Mode:** This shows what type of manual

control the output is under (if any);

- **[Manual Control]:** Allows manually controlling the output. Details to follow / below.
- **Timer:** This shows the remaining duration for a timed output function that is presently in effect;
- **Equation:** This area shows details on the programmed function / equation for the output.

**Control & Status ⇨Panel Control & Status ⇨Outputs**



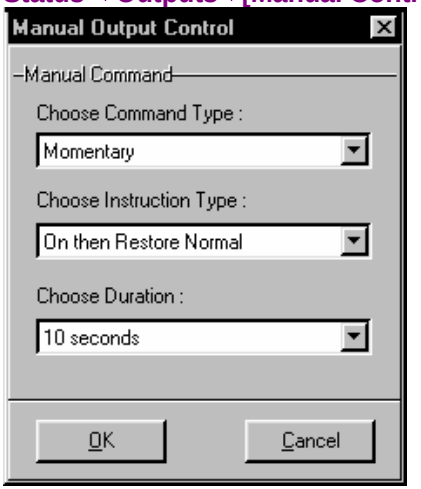

## Controlling an Output Manually

Access the "Outputs" control & status topic as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.
Forms view: Details for one item at a time;
Grid View: All items in a list.

Select the desired output (bottom of the 'forms' window), and click **[Manual Control]** near the upper-right corner of the form;

Then, refer to the selection-descriptions for this screen while making your selection(s).

**Control & Status ⇨Panel Control & Status ⇨Outputs⇨[Manual Control]**




Tip: Additional parameters appear when applicable (duration, etc.).

- **Normal:** No manual control (i.e., return to normal operation);
- **Always:** Allows setting the output as On or Off continuously (until manual control is removed);
- **Momentary:** Allows setting the output to pulse/toggle once. Additional selections will appear for: • Whether it is to be triggered On (high), or Off (Low); • The state it will be left in afterwards (Off, On, or Normal); • How long the relay will remain triggered (1 second to 1 week).
- **Duty Cycle (1 sec. On/1 sec. off):** The output will be pulsed on and off continuously for a selected duration (1 second to 1 week).

# Guard-Tours: Monitoring

## Introduction to Guard Tours

### Guard Tours

A guard-tour can be thought of as either:

- A path that must be completed by a guard in a certain amount of time—including stations (checkpoints) along the way, **or**;
- The process of the guard making his/her way through the assigned route.

Tip: If so configured, areas can be disarmed and re-armed automatically as the guard moves through the designated route.

**Note:** A guard tour cycles through the defined 'stations' (checkpoints) and then stops (it does not automatically restart at the beginning).

Each 'station' can be a reader/door (that will be monitored for a specific user), or a physical input-point (key-switch, etc.) that is operated by the guard.

Once defined guard tours can be activated and/or monitored by anyone with the appropriate permissions. As well, reports can be generated on guard tours that occurred previously.

### Guard Tour Monitoring

When any guards are to begin their assigned routes, the associated "Guard Tours" can be activated, thus allowing an operator to monitor each guard's progress, and respond if needed.

Guard Tour Events: Activity messages pertaining to guard-tours (and guard-tour stations) are not transmitted to a central monitoring facility.

Guard Tour Setup: Before a guard-tour can be monitored, it must first be defined as per the stations (checkpoints) along the way, and the allowable times between stations. (Details appear in a following section / below.)

**Connecting to the Associated Panel(s), An Overview:**

**1)** See if you're already connected by checking the status bar at the bottom of the monitoring window.
Multi-account systems: Ensure your desired account is selected (click **[Account Folders]** in the tree, and then double-click the specific account).

**2)** If **not** connected, check to ensure the communication software is running on the specific PCs (check the Windows task-bar for an LCD/Telephone symbol). Start up the software if necessary.
(From the **Start** menu, select: **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communications**.)

**3)** Select **Communications** from your MyTools bar, **or** click **[Communications]** in the 'tree', and select **Pending/OnLine**.

**4)** Click the **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu. Then, select the desired panel(s) (double-click to select), and set "Action" to "Normal", and "Frequency" to "Stay Connected" (✓). (Click **OK** when finished.)

**5)** Check that the connection is made, and watch for the panel updates to occur.
(Click the 'Panel Group', and look for the status on the right side of the screen.)

**Note:** Guard-tour monitoring features will be available after the panel updates have finished (look for a connection state of 'Connected' and 'Idle State'.)

**Also See** (Related Topics):
**+** "Panel Communications and Updates"

# Activating and Monitoring Guard Tours (that have already been set up)

## Activating a Guard Tour (Adding it to the Guard Tour Monitor)

Initiate a connection with the associated panel(s) as described previously / above.

Then, select **Guard Tour Monitor** from the MyTools bar, **or** click your site/account button in the tree, 'open' **Control & Status** (click the "+"), and select **Guard Tour Monitor**.

Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Now, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Status for one guard-tour at a time;
Grid View: All active tours in a list.

In 'Forms' view, right-click the form, and select **Start Tour** (or **Add New**). (For 'Grid' view, click the **[...]** beside the word "Start".)

Then, refer to the selection-descriptions for this screen while selecting a "Guard Tour", "Start Point", and "User". (Click **OK** when finished.)

## Monitoring Guard Tours in Progress

Select **Guard Tour Monitor** from the MyTools bar, **or** click your site/account button in the tree, 'open' **Control & Status** (click the "+"), and select **Guard Tour Monitor**.

Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In forms view, you can select a 'tour' at the bottom of the window, or right-click the form and select **Find** to search for a guard-tour by name (or the 1st few characters--e.g., nam*).

Refer to the selection-descriptions for this screen while monitoring the specific guard tour. **Be sure to dispatch someone promptly if the need arises.**

**Tip:** To view additional items, you can use the scroll-bar at the bottom of the window.

**Note:** Guard tour monitoring will be suspended if the panel connection is dropped for any reason. (You can check your connection status simply by checking the status bar at the extreme bottom of the desktop.)

## Stopping the Monitoring of a Guard Tour (Deleting it from the Guard Tour Monitor)

Select **Guard Tour Monitor** from the MyTools bar, **or** click your site/account button in the tree, 'open' **Control & Status** (click the "+"), and select **Guard Tour Monitor**.

Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

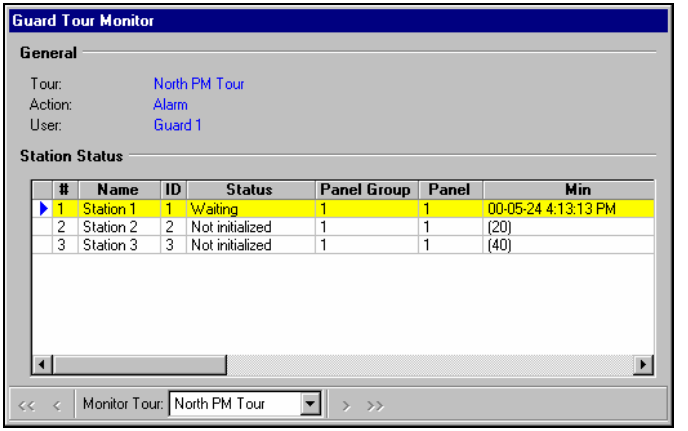
Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In forms view, you can select a 'tour' at the bottom of the window, or right-click the form and select **Find** to search for a guard-tour by name (or the 1st few characters--e.g., nam*).

Then, right-click the form and select **End Tour** (or **Delete**). When asked to confirm, select **Yes**.

(In Grid view, click the (Stop) **[...]** on the row for the desired tour. When asked to confirm, select **Yes**.)

## Control & Status ⇨Guard Tour Monitor




- **Monitor Tour** (bottom of form)**:** This is where you select an active guard tour to view its progress/status. This area shows the name of the guard tour (as defined under "Guard Tour");
- **General:** This area shows the 'tour' being monitored, plus the name of the guard (user), and the defined action to occur if the guard is late or absent at any of the stations (checkpoints).
- **Station Status:** This area lists the stations (checkpoints) in the selected tour being monitored, plus the status, elapsed time, and other items for each checkpoint;

Not Initialized: A status of 'Not Initialized' refers to a guard-tour station that occurs later in the tour (i.e., after the next / pending station).

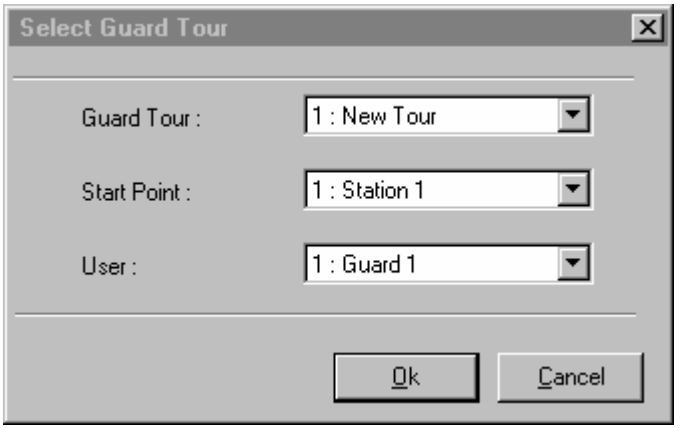
Area Arm/Disarm Commands**:** These trigger automatically when the guard accesses the preceding station within the allowed time.

**Tip:** To view additional items, you can use the scroll-bar at the bottom of the window.

Grid View: In Grid view, you will see a list of all active guard-tours, showing the tour names, guard (user) names, present status, and the present (last) station accessed. Selections are also provided to **Stop** the monitoring of an active tour, or **Start** (activate) a tour.

---

## Right-click screen, and select "Start Tour" (Add New)




- **Guard Tour:** This is where you select a (previously defined) guard tour to begin monitoring;
- **Start Point:** This allows starting the tour at any station / checkpoint (select the station that the guard will begin with).

**Notes:** For the station selected as the 'Starting Point', the min/max times are relative to the tour activation time (i.e., when you click **OK**).

A guard tour cycles through the defined 'stations' (checkpoints) and then stops (it does not automatically restart at the beginning).

- **User:** This is the "user" (i.e., the guard) to be performing the guard tour.

# Guard Tours: Initial Set Up

## Overview

To set up a guard-tour:

**1)** Ensure the applicable readers and other guard-tour stations (checkpoints) have been defined in the system.

Guard tour inputs require a "Custom Point Type" with the "Preprocess" set as "Guard Tour" (and the "Level" set as "24 hours").

To add a reader/door or guard-tour input-point to the system, refer to:

- "Doors, Readers, and Related Settings",
- "Input Points—Custom Point Types", and
- "Input Points—Monitored Sensors", as applicable.

**2)** Set up the new guard-tour, which includes the readers and other guard-tour 'stations' along the guard's route. (Refer to the selection-descriptions for this screen for details);

Tip: Areas and associated arm/disarm commands can also be inserted as desired. (These trigger automatically when the guard accesses the preceding station within the allowed time).

**3)** Double-check the order for the 'stations', and the acceptable range of time between each location.

**Note:** "Grid" view does not apply to this topic.

### Adding a Guard Tour

Select **Guard Tours** from the MyTools bar, **or** click your site/account button in the tree, and select **Guard Tours**.

Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Now, click **[+]** at the bottom of the form, or right-click near the top or bottom of the form (**not** the centre portion), and select **Add New** from the pop-up menu.

Alternative: You can also select "New Tour" from the list at the bottom of the window.

Now, refer to the selection-descriptions for this screen while setting up the guard-tour as desired. (Set the name and "Action", and add stations (checkpoints), with associated time-ranges).

### Viewing or Changing Settings for a Guard Tour

Select **Guard Tours** from the MyTools bar, **or** click your site/account button in the tree, and select **Guard Tours**.

Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, choose the desired guard-tour at the bottom of the window.

**Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Now, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

### Deleting a Guard-Tour

Select **Guard Tours** from the MyTools bar, **or** click your site/account button in the tree, and select **Guard Tours**.

Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

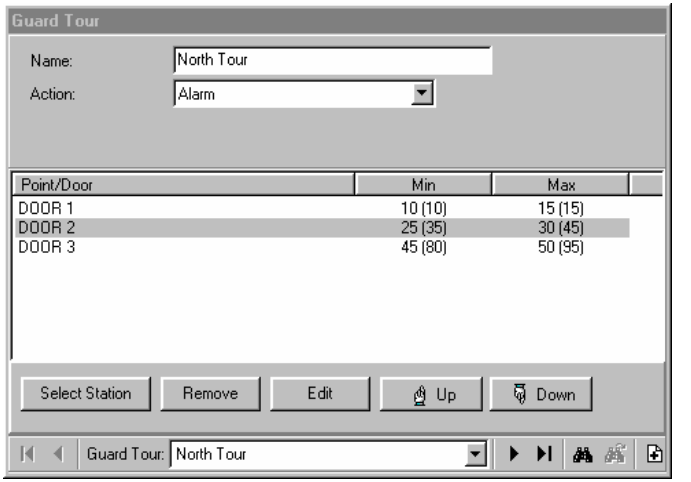
Now, choose the desired guard-tour at the bottom of the window.

**Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank (grey) area near the top or bottom of the form (**not** the centre portion), and select **Delete**. When asked to confirm, select **Yes**.

( ⇨ )

## Guard Tours




- **Guard Tour** (bottom of form)**:** This is where you select a guard tour to view or edit (or "New Tour" to add a new one). This area shows a reference number assigned by the system, and the name of the guard tour, once defined;
- **Name:** A suitable name / description for the guard-tour.

  **Tip:** Be sure to **change** this from the default setting of "New Tour".
- **Action:** The actions to occur if the guard is late or absent at one of the checkpoints (whether to abort the tour, trigger an alarm, and/or sound the siren output on the specific panel);
- **(Station / Checkpoint List):** The main portion of this screen shows the stations (checkpoints) for the selected guard-tour, in the order they occur. The minimum and maximum times are also shown (both since the previous checkpoint, and the total).

  Area Arm/Disarm Commands**:** These trigger automatically when the guard accesses the preceding station within the allowed time.

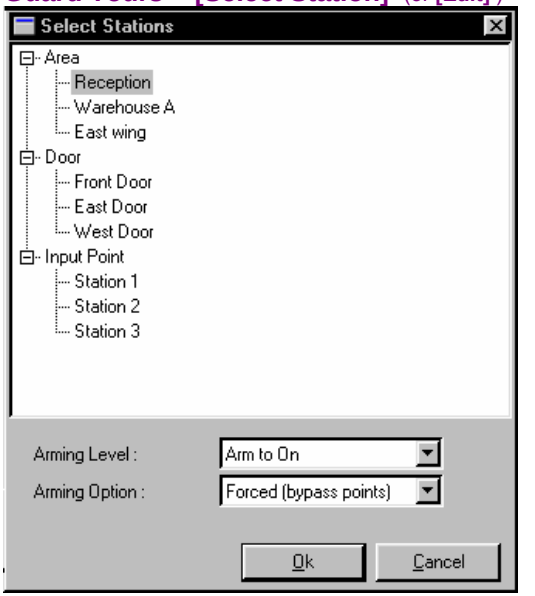
- **[Select Station]:** Click this to allow adding doors and guard-tour input-points to this guard-tour, and setting the allowable time-range for the guard to arrive from the previous station / checkpoint (in minutes);

  This is the same as right-clicking the centre portion of the form and selecting "**Add New**".

  Multi-**Panel** Systems: Items to be added to a guard-tour can be set to display either as a single list, or on a panel-by-panel basis. For details on these choices, refer to "Other Desktop Choices".
- **[Remove]:** Click this to remove a selected checkpoint (door or input-point) from the guard-tour;
- **[Edit]:** Click this to allow changing an existing checkpoint:
  + Selecting a different door or guard-tour input-point, and/or;
  + Changing the allowable time-range for the guard to access this checkpoint;
- **[Up]:** Moves a selected checkpoint up to an earlier position in the guard-tour, while leaving the time-range values as-is;
- **[Down]:** Moves a selected checkpoint down to a later position in the guard-tour, while leaving the time-range values as-is.

After changing the position of any stations (checkpoints) in a guard-tour, be sure to always re-check the min/max time values. (To change the times, select the item in the guard-tour, click **[Edit]**, and make your desired changes, clicking **[Ok]** when finished.)

## Guard Tours ⇨[Select Station] (or [Edit] )




- **Doors and Input Points** (top of the form)**:** This is where you select the specific door or input-point pertaining to the guard-tour station being added or changed;

  Area Selections: See "Automatic Area Disarming / Rearming", to follow / below.

  To be available here, the specific areas and devices must already be defined in the system. As well, guard tour inputs must be set as a "Custom Point Type" with the "Preprocess" set as "Guard Tour" (and the "Level" set as "24 hours"). For details, refer to:
  - "Doors, Readers, and Related Settings",
  - "Input Points—Custom Point Types", and
  - "Input Points—Monitored Sensors", as applicable.

- **Minimum Time:** The minimum allowable time for the guard to reach this station (from the previous one);
- **Maximum Time:** The maximum allowable time for the guard to reach this station (from the previous one);

  **Note:** For the 1st station (i.e., the "Start Point" selected under "Guard Tour Monitor"), the time is from when the guard tour is activated (i.e., when the guard tour is 'added' to the Guard-Tour **monitor** screen).

---

## Automatic Area Disarming / Rearming

If you select an area instead of a door or input point, this allows setting that area to disarm or rearm automatically when the guard accesses the preceding station within the allowed time.

- **Arming Level:** For an area selection, this provides area arm/disarm choices. Note: "Arm to Stay" will occur only if the area is disarmed (Off); "Disarm to Stay" will occur only if the area is fully armed (On).
- **Arming Option:** For an area selection, this sets the type of arming (i.e., whether or not any sensors (points) that are not 'OK' will be automatically bypassed to allow the arming to occur).

# Panel Communications and Updates

Beginning with V4.0 MONITOR ISM Director, you can use the **Communications Wizard** to set up and initiate communications with a panel. For more information, refer to "New Installation? Try the Wizard!"

The initial topics in this section provide general information on panel communications.

For an overview of the steps required to connect with a panel, refer to the installation topic "**Panel Connection Overview**".

To go directly to the steps required to start a panel communications session, browse forward to the heading entitled "Connecting with a Panel...".

## Panel Communications

### About Panel Communications

Panel communications allows transmitting changes to panel(s), plus maintaining a connection to allow:

- Updating the monitoring window;
- Tracking a guard-tour;
- Checking the status of items, and/or controlling items in a specific location.

A panel communications session can be initiated right away, scheduled for some time in the future, or set to a rotating schedule (hourly, daily, or weekly). In a single-PC system, communications can also to set to start automatically (details appear in a following section).

Panel⇔software updates can be:

- Normal (bi-directional / synchronize);
- Send to Panel (downloads MONITOR ISM Director settings to the specific panels);
- Get from Panel (uploads settings from the panel into MONITOR ISM Director).

In each case the connection can either be dropped at the end of the session, or the software can "Stay Connected" for on-going data synchronization, event transmission, and/or checking status or controlling items.

If a connection is maintained (Stay Connected), any ongoing admin. & configuration changes are synchronized automatically when you save your changes, or move to a different screen.

This also allows the software to reconnect with the panel(s) whenever communication services are restarted (i.e., manually, or if prompted for this during start-up).

For a failed communication session that is set to "Stay Connected", the software will continue trying to initiate a connection, and list the results for each new attempt.

**Software vs. Panel Conflicts** (esp. **large systems**): Differences between the software database and settings entered locally through an LCD keypad can be identified by selecting "**Check Database for Conflicts**" from the **Tools** menu. For details, search for that topic in the index.

As well, partial panel updates are indicated in the user list (grid view) with special colours: Yellow: Partial updates pending (some panels have not been updated); Green: Data for the user has been changed while partial updates were pending (the user's settings at the panels will be overwritten on next update). For details on the "user" screen, refer to the topic on **Users**.

### Am I Connected? (Check Status)

Account Connection Status:

The status bar at the extreme bottom of the screen continually shows the connection status for your selected account, and whether or not specific updates are in progress.

So, to check the communications status of an account, simply check the status at the bottom of the screen.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Status of a **Current** Communications Session:

For more information on an active communications session, refer to "Checking the Status of your Connection...", to follow.

Status of a **Previous (or failed)** Session:

To check the status of a previous communications session or attempt (for example to see if it was successful, or failed), refer to "Viewing the Status of Previous Communications Sessions", to follow.

### The Cable or Modem Link

Each panel connects through either a physical cable, or via dial up access using standard modems. Any workstation associated with your MONITOR ISM Director system can be used for panel communications. This requires:

- A proper physical connection (cable or modems);
- Settings as required for MS Windows and this software;
- The MONITOR ISM Director communications component being installed (and running) on each applicable PC.

**Note:** With smaller sites (Single-panel / 300 users), remote management is also supported through the built-in dialler (Bell 103, 300 baud modem) on each panel.

### IP Connections:

With IP connections (≥ **v3.3** software), a "Panel Group" can include **any** 1-30 panels within an account--whether they share the same connection or not. In this case, panel groups will typically be set up based on geographic location, or network characteristics. The MONITOR ISM Director software will be able to communicate with any number of panels within the group using only one port (IP Device) on the specific PC.

Setting up an IP Connection: This is documented separately. For details, refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

### Settings Required for Panel Communications

Various items must be set correctly to allow panel communications (including the panel version). To set up an initial panel connection, refer to "New Installation? Try the Wizard!", or "Panel Connection Overview".

### The Communications Software

All panel communications are handled through the communications software that is included with MONITOR ISM Director. This must be run on the PC that is associated with each specific panel (and/or modem).

For a single-PC installation, communications can be set to start automatically when an operator logs in.

For details, refer to "Setting Communications to AutoStart when an Operator Logs In", to follow.

For a multi-PC (client-server) installation, the communications software must be started manually on each applicable PC (unless it has been added to the Windows "Startup" folder).

Multi-PC (client-server) system: The server PC and software must be running, and available on (logged onto) the network. Director-Server PC: This is the PC that includes **"...Director-Server.exe"**, and typically contains the database as well.

For related topics, refer to "Software Activation and Licensing", and "Client/Server Start-up Issues".

### Ensure the Communications Software is Running on the Specific PC(s)

At **each** PC associated with the specific panel connection(s):

- Check the Windows task bar for an LCD/Telephone symbol near the right-hand end. (If present, the communications software is already running);
- If the LCD/telephone symbol is **not** present, start the communications software: From the **Start** menu, select **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communication**.

To ensure the software started: Re-check the task-bar for the LCD/Telephone symbol on the right.

Note: If you are prompted for something you are not familiar with, or if an error message appears, refer to "Serial Port / Modem Setup (Communications Software)".

To set the communications software to start-up and shut-down automatically in a single-account system, refer to "Setting Communications to AutoStart when an Operator Logs In", to follow.

### Manually Shutting Down the Communications Software:

On the specific PC, right-click the LCD/Telephone symbol near the right-hand end of the task-bar, and select **Exit**. If asked to confirm, select **Yes**. **Note:** This will disable communications for panels associated with this PC until the communications software is restarted.

**Attention:** Shutting down communications while a panel update is in progress is NOT recommended, as this can leave panel database(s) in an unknown state.

# Activating Communications and Transferring Panel Settings

## Panel Communications Sessions

The Communications Pending/Online screen shows details on panel communications sessions (panel updates) that are either presently active, or scheduled for some time in the future.

For communications / update sessions that have completed successfully, plus any attempts that may have failed, see "Viewing the Status of Previous Communications Sessions", to follow.

## Connecting with a Panel (Setting up a Panel Communications Session)

**1)** See if you're already connected by checking the status bar at the bottom of the monitoring window.
Multi-**Account** systems: Ensure your desired account is selected (click **[Account Folders]** in the tree, and then double-click the specific account).

**2)** If **not** connected, check to ensure the communication software is running on the specific PCs (check the Windows task-bar for an LCD/Telephone symbol). Start up the software if necessary.
(From the **Start** menu, select: **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communications**.)

**3)** Select **Communications** from your MyTools bar, **or** click **[Communications]** in the 'tree', and select **Pending/OnLine**.
Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.
Forms view: Details for one communications session at a time; Grid View: All current sessions in a list.

**4)** Click the **[+]** at the bottom of the form, **or** right-click the form, and select **Add New** from the pop-up menu.
You can also select a blank/new item from the list (Forms view: bottom of the window), and then click **[Edit]**.

**5)** Then, select (double-click) the desired panel(s) on the left side of the form.
Similarly, you can double-click again to deselect a panel.
Multi-**Account** Systems: If the desired account is not listed (that you have permissions for), open the account in the tree (click **[Account Folders]**, then double-click the account). Then, return to "Communications", and "Pending/Online" in the tree (and perform step 5).

**6)** When the next screen appears (Edit Communications), refer to the selection-descriptions for it while making additional selections. (Click **OK** when finished.)

**7)** Check that the connection is made, and watch for the panel updates to occur.
(Click the 'Panel Group', and look for the status on the right side of the screen.)

**Note**: If minor conflicts exist during a communications session, you will be prompted to correct them. If major conflicts exist, the update will fail (for details, see "Correcting Errors..." to follow).

**Also See** (Related Topics):

**+** "New Installation? Try the Wizard!"
**+** "Panel Connection Overview"

## Checking the Status of your Connection (Communications Session)

(Select **Communications** from your MyTools bar, **or** click **[Communications]** in the 'tree', and select **Pending/OnLine**.)

If the desired communication session is not presently on-screen, select it from the list.

**Tip:** In 'forms' view, you can select a session at the bottom of the form, or use the 'browse' buttons to move through the list.

Select the specific 'panel group' in the 'tree' near the centre of your screen. Then, check the 'status' and 'results' areas on the right. You should either see updates being processed, or "Connected" and "Idle State".

If the desired communications session is not listed, this means that it has either completed successfully, or failed (and/or was not set to "Stay Connected").

**Tip:** To view the status of any **completed** communications session (or attempt), see "Viewing the Status of Previous Communications Sessions", to follow.

If status listed as "**Pending**" for a long time:

- Try shutting down and restarting the communications software, and recheck your connection status. **Tip:** For a single-PC system which is set to auto-start communications, simply logout, log back in, and recheck your connection status.

  Reminder: LCD/**telephone** symbol on the taskbar, and "... Director-**Communications**.exe". For more information, refer to "Ensure the Communications Software is Running on the Specific PC(s)" near the beginning of the panel communications topic.
- Try powering down and restarting the PC (and/or modem), and recheck your connection status.
- Check to ensure that the 'Communication Pool' being used for the connection is properly set up. For details, refer to "Communication Pools for System Panels".

### Update Requests Initiated from a Panel

Update requests can be initiated from a remote/dial-up panel (≥ **V2.0**). This can be for a new panel that has not been programmed (known as being in 'cold boot' state). A service technician at a system keypad can also request a remote synchronization at any time.

For details on initiating a remote update request from a keypad at a remote site, refer to the MONITOR ISM Commissioning Reference Guide.

For a new system: The software must be fully set up with the desired settings, and a scheduled communications session must be set up for the account with the Schedule "Type" set to "On Next Call".

To set up an initial panel connection, refer to "New Installation? Try the Wizard!", or "Panel Connection Overview".

### Cancelling / Dropping a Connection

Click **[Communications]** in the 'tree', and select **Pending/Online**. Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Select the desired communications session in the list. **Tip:** In 'forms' view, you can select a session at the bottom of the form, or use the 'browse' buttons to move through the list.

Check to ensure that associated panels are not presently being updated: Find / select the 'panel group' near the centre of the screen, and check the "Results" on the right.

**Note:** Disconnecting is NOT recommended while panel(s) are being updated.

Now, right-click the session/form, and select **Disconnect**. If prompted to confirm, select **Yes**.

### Viewing or Changing Settings for a Communications Session that is Not Presently On-Line

**If Presently Connected (Transaction Locked):** You cannot edit a communications session while connected with the associated panel(s). (Clicking **[Edit]** will produce a "Transaction Locked" message.)

For a session that is either scheduled for some time in the future, or that is off-line due to a disconnection, you can check and/or change the present date/time and other settings as desired:

Click **[Communications]** in the 'tree', and select **Pending/Online**. Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Select the desired communications session in the list. **Tip:** In 'forms' view, you can select a session at the bottom of the form, or use the 'browse' buttons to move through the list. Details for the selected session will be shown at the top of the screen.

If the desired communications session is not listed, this means that it has either completed successfully, or failed (and/or was not set to "Stay Connected").

**Tip:** To view the status of a **completed** communications session (or attempt), see "Viewing the Status of Previous Communications Sessions", to follow.

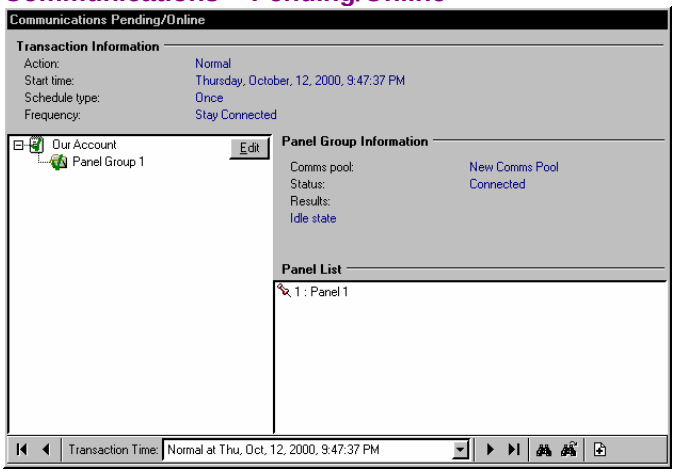
To change a scheduled time, or other settings for a communications session, click **[Edit]**, and refer to the details for the "Edit Communications" screen while viewing and/or changing settings as desired. (Click **OK** when finished.)

**Tip:** To select or deselect a panel, locate and double-click the specific panel (under the applicable account). To select or deselect all panels for an account, right-click the account, and select "Add Account" or "Remove Account" as desired.

---

Sample screens and selection-descriptions appear on the following pages.

## Communications ⇨Pending/Online




**-Transaction Time** (bottom of the form)**:** This area allows selecting a communications session that is either presently in effect, or scheduled to occur sometime in the future.

**Tip:** Completed sessions (and failed attempts) can be viewed under "Completed" in the tree (see "Viewing the Status of Previous Communications Sessions", to follow.).

**-Transaction Information:** The top of this screen shows the type of connection, and scheduling information for your selected / current communications session.

**-Account / Panel Group 'Tree':** The left side of this form (centre of your screen) shows the account(s) and panel group(s) associated with the selected communications session. **Tip:** Selecting a 'panel group' allows viewing the connection status and other information (see the next two items).

**-Panel Group Information:** This area shows the connection status and other information for a panel group that you select in the tree.

**-Panel List:** The lower-right portion of the screen shows all panels in a 'panel group' (after you select one).

**Tip:** Panels associated with the communications session will have coloured icons beside them.

### (Buttons)

**- [Edit]:** This allows setting up a panel communications session, or editing settings for a scheduled session.

**If Presently Connected (Transaction Locked):** You cannot edit a communications session while connected with the associated panel(s). To disconnect: Right-click the session/form, and select **Disconnect**. If prompted to confirm, select **Yes** or **No** as desired. **Attention:** Disconnecting is NOT recommended while panel(s) are being updated. (Find / select the panel group near the centre of the screen, and check the "Results" on the right.)

---

**-Account / Panel / Group 'Tree' :** The left side of this form shows the panel group(s) and panels to be associated with a communications session (find the desired panel, and then double-click to select it).

**Note:** This area lists only the panels that are **not** presently connected or otherwise associated with a current communications session.

### Action

**- Normal:** The software will automatically attempt to synchronize settings stored in the software, and at the panel(s).

**Tip:** This is commonly used when connecting only to update the monitoring window, or check status or control items.

(This setting cannot be used after installing a panel upgrade, or if you change the "Feature-Set" value for a panel.)

**- Send to Panel:** Settings stored in the software will be downloaded to the panel(s), overwriting any previous settings stored there. (This is normally used for new panels, or after making a large number of changes in the system.)

This selection is also required if you changed the **'Feature-Set'** value for a panel. For details on the feature-set parameter, refer to "Account-Wide Panel Settings".

For details on updating / synchronizing the clock (date and time) for a panel, refer to "Set the Date/Time for a

Panel, or Reset APB Status for Users".

- **Get from Panel:** Settings at the panel(s) will be updated into the software. (This is useful when adding MONITOR ISM Director to a system that was programmed by other means, or in the event of the MONITOR ISM Director (software) database being accidentally cleared —with no 'backup' copy available.)

For a multi-**panel** account, settings that are account-wide (e.g., Users, schedules, etc.) are taken from one panel set as the "**Master Panel**". This panel must therefore be available during the transfer.

Local user admin. (via keypad) is supported in all systems, while local system configuration is supported only in single panel systems set to "**Feature Set**" 1, 2, 3, or 4.

The "**Service PIN**" can be changed only through the MONITOR ISM Director software (the value at the panel is ignored / over-written).

For details on "Master Panel", "Feature-Set", or "Service PIN", refer to "Account-Wide Panel Settings".

- **Stay Connected:** MONITOR ISM Director will maintain a 'Normal' connection after transferring or synchronizing settings, to allow for real-time monitoring (through the monitoring window), and checking status of items, or controlling items (through "Control & Status" in the tree).

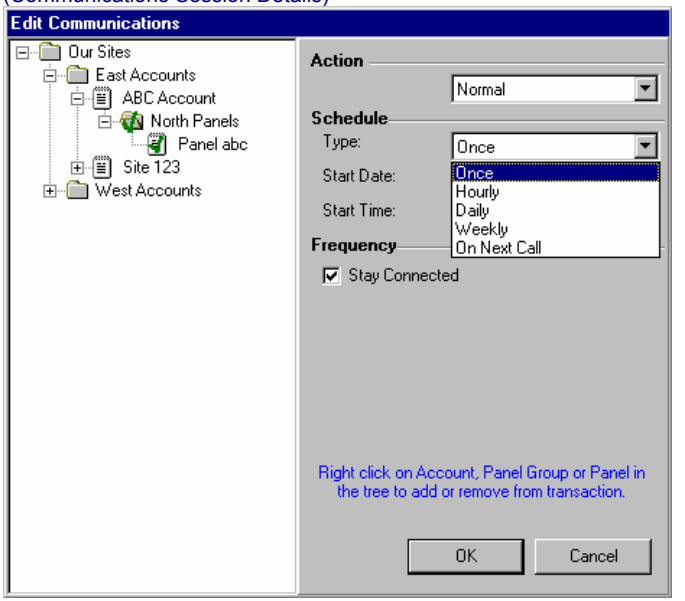
**Auto-Connect to Panel:** If "Stay Connected" is used with a single-PC installation that is set to "AutoStart communications", the software will attempt to reconnect when an authorized operator logs in. This:

+ Removes the necessity to manually connect to the panel (especially useful for a single-panel installation);
+ Keeps data (users and all settings) at the panel and software in sync;
+ Ensures the monitoring window and activity reports will be up-to-date.

For details on the "Autostart" feature, refer to "Setting Communications to AutoStart when an Operator Logs In", to follow.

## Communications ⇨Pending/Online ⇨ [ Edit ]

(Communications Session Details)




### Schedule

- **Type:** Whether the connection / update is to occur only once, or as per a rotating schedule (hourly, daily, or weekly).

  **On next Call:** This pertains to the next time a connection is initiated. Tip: This can be set up ahead of time, allowing a technician at a new site to request a 'remote update' once the installation is complete.

- **Start Date:** The date that the communications session is to occur. (The default is 'today').
- **Start Time:** The time that the session is to occur. (The default is 'now/immediate'.)

  Client/server Systems: The date and time are as per the MONITOR ISM Director **server** PC. If this is different relative to your workstation, you may to need to compensate. Director-Server PC: This is the PC that includes "**...Director-Server.exe**", and typically contains the database as well.

- **Stay Connected:** Whether or not the connection is to be maintained after the panel(s) have been updated.

  **Tip:** This selection is used with Real-time monitoring (through the monitoring window), and checking status of items, or controlling items ("Control & Status" in the tree).

# Viewing the Status of Previous Communications Sessions

**Tip:** The most common reason for a failed communications session is a faulty physical connection, or incorrect communications settings. For details on initially setting up a panel connection, refer to "New Installation? Try the Wizard!", or "Panel Connection Overview".

## Completed Communications Sessions

The "Communications Completed" screen shows details on previous (and/or **failed**) panel communications sessions (panel updates). This allows you to check which connections or update sessions were successful, and/or look into why a session may have failed.

For details on communications / update sessions that are either presently active, or scheduled for some time in the future, see "Activating Communications and Transferring Panel Settings", previous.

Event Message: A single "Comms Panel Fail" message will be generated if a panel connection is dropped, or at the beginning of a block of consecutive failed connection attempts.

## Viewing Details on a Previous Update Session or Attempt

Select **Communications** from your MyTools bar, **or** click **[Communications]** in the 'tree', and select **Completed**).

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one communications session at a time; Grid View: All current sessions in a list.

Select the desired communications session in the list.

**Tip:** In 'forms' view, you can select a session at the bottom of the form, or use the 'browse' buttons to move through the list. The status details and other information will be shown for your selected communications record.

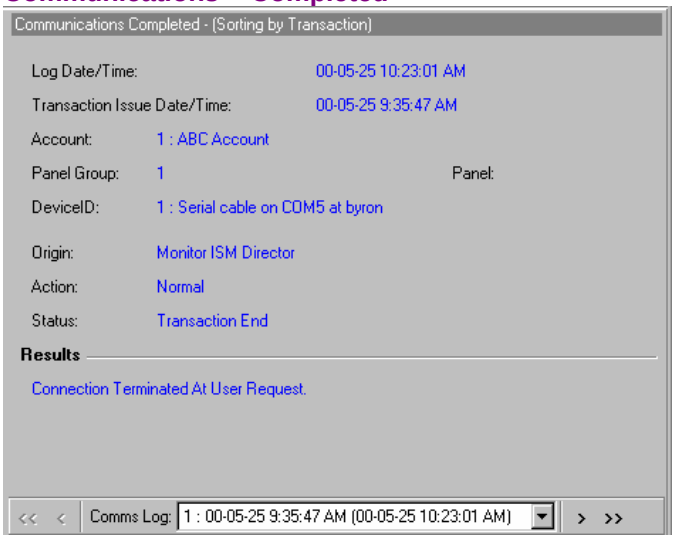
**Each communications session produces multiple log entries. (Click " ▶ " to browse through the previous few entries to see all information for each communications session.)**

Multi-Account Systems: In forms view, sessions are listed in order--regardless of which account they pertain to. To find a session for a specific account, switch to Grid view, and locate/select the session (and return to Forms view if desired).

Note: Session #1 is the most recent, while the highest numbered session is the **oldest**.

If the desired communications session is not listed, this means that it has not yet started (i.e., scheduled for some time in the future). **Tip:** For details on communications / update sessions that are either presently active, or scheduled for some time in the future, see "Activating Communications and Transferring Panel Settings", previous.

## Communications ⇨Completed




- **Comms Log** (bottom of the form)**:** This is a relative number for each update session, plus the date and time that each one occurred. **Note:** Session #1 is the most recent, while the highest numbered session is the oldest.
- **Log Date/Time:** The date and time when the session finished.
- **Transaction Issue Date/Time:** The date and time when the communication session was set up.
- **Account:** The account/site associated with the panel(s) being updated.
- **Panel Group:** The panel group associated with the panels being updated.
- **DeviceID:** The communications device-pool associated with the panel(s) being updated.
- **Origin:** Whether the session was requested through the MONITOR ISM Director software, or from a panel.
- **Action:** The type of session ('Normal', 'Get from Panel', or 'Send to Panel').
- **Status:** Whether or not the session completed successfully (or if it is still in progress).
- **Results:** A brief description on an action that occurred, and/or what may have caused it to fail (details to follow).

**Note:** For a failed communication session that is set to "Stay Connected", the software will continue trying to initiate a connection, and list the results for each new connection attempt.

# Correcting Communication/Update Errors

**Tip:** The most common reason for a failed communications session is a faulty physical connection, or incorrect communications settings. To set up an initial panel connection, refer to "New Installation? Try the Wizard!", or "Panel Connection Overview".

**Panel Version Mismatch:** If you get an error due to a "Panel Version Mismatch", ensure your panel version is set correctly under:
***AccountName*** ⇨**Account Information** ⇨(**Standard** tab) ⇨"**Panel Version**".

## About Communication Errors

Sometimes, the MONITOR ISM Director software will be unable to start communications with the panel, or unable to synchronize the data between the software and the panel. This can be due to:

**Critical / Failure Errors:**

- A serial cable / modem wiring or connection problem;
- An incorrect serial port selection, or incorrect serial communications settings;
- A 'TAPI' communications error;
- A 'referential' data error (assignments to certain items that don't exist either at the panel or in the software);

**Non-Critical Errors during a 'Normal' Communications Session (You'll be Asked to Correct These):**

- The same value being assigned to two different items (e.g., two users with the same card number);
- Different settings for a single item (e.g., the software says user 8 has card number 1234, and the panel says user 8 has a different card number).

These types of errors are typically caused by the same item being edited through the software and by a local admin. person at a system keypad.

## Getting Details on an Update Error

To find out why a communications session may have failed, view the details for the specific session as described under "Viewing the Status of Previous Communications Sessions", previous.

**Software vs. Panel Conflicts** (esp. **large systems**): Differences between the software database and settings entered locally through an LCD keypad can be identified by selecting "**Check Database for Conflicts**" from the **Tools** menu. For details, search for that topic in the index.

As well, partial panel updates are indicated in the user list (grid view) with special colours:
Yellow: Partial updates pending (some panels have not been updated);
Green: Data for the user has been changed while partial updates were pending (the user's settings at the panels will be overwritten on next update). For details on the "user" screen, refer to the topic on **Users**.

## Correcting a 'Data Reception' Error

A "reception", "not responding", or "failed to communicate" error can occur if the system panel (or modem) has been powered down, or if there is a problem with the serial cable, or the serial/COM port selection or settings.

Troubleshooting Tip: If the status is listed as "Pending" for an extended period of time, this may mean:

- The communications software is not running on the PC associated with the panel or modem. To check for this, refer to "Ensure the Communications Software is Running on the Specific PC(s)", previous.

  Reminder: LCD/**telephone** symbol on the taskbar, and "... Director-**Communications**.exe". For more information, refer to "Ensure the Communications Software is Running on the Specific PC(s)" near the beginning of the panel communications topic.
- The serial port on the specific PC is not responding. In this case, try shutting down and restarting the PC. Then, recheck your connection.

For a new system: Ensure the panel connection is properly set up. For details, refer to "New Installation? Try the Wizard!", or "Panel Connection Overview".

### Correcting a 'TAPI' Error

A 'TAPI' error can normally be corrected by shutting down the MONITOR ISM Director software, and **restarting** the computer.

With a **new** installation, a 'TAPI' error can also indicate that the 'Direct/Serial Cable Connection' or modem was not been properly set up under MS Windows.

For details on setting up windows serial communications, refer to "Direct-Cable Connection Setup" or "Windows Modem Setup", as appropriate.

### If you are Prompted to Fix a Data Conflict

If a non-critical data conflict occurs during a 'normal' communications session, you'll be asked to correct the error right away. In general, you'll be asked to:

- Choose between using a setting from MONITOR ISM Director, or a conflicting one at the panel, **or**;
- Edit a value right-away to correct a conflict.

Sometimes, you can choose to **[Decide Later]** on what data to use. In this case, the software data is retained, and the item (user, etc.) will appear with that setting highlighted in a different colour. **Tip:** To correct any conflicts that had been selected as "Decide Later", simply select the applicable area in the tree (such as User), and follow the 'Conflicting Data...' screens that appear. (Click **Refresh** or press **F5** if required.)

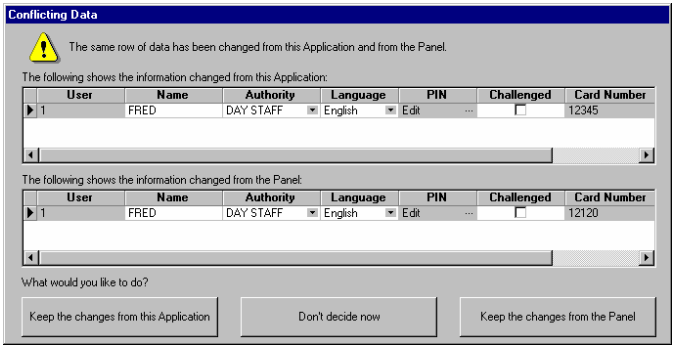
### Correcting a 'Referential' Data Error

If, for example, authority 'ABC' is deleted in the software, yet User 'Zig' is still assigned to that authority level at the panel, a 'normal' communications session will produce an error, and the update will not occur.

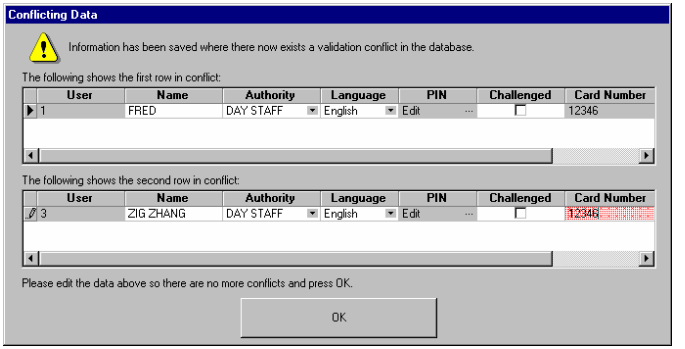
To correct this you can either:

- Find and correct the error, **or**;
- Issue a "Send to Panel" to overwrite the panel's settings with those at the software.

### Different Values Assigned to the Same User




### Same Unique Value Assigned to two Different Users




**Note:** Updates done at a system panel (through an LCD keypad) while conflicts are being resolved will be ignored.

To determine what is causing a 'referential' conflict:

- Find out what was changed at the panel by contacting the (keypad) user/admin. person, **and/or**;
- Refer to "Viewing the Status..." (previous), to determine the type of items that are in conflict, and then access the panel to locate and correct the discrepancy (e.g., assign a valid 'authority' to the specific user, etc.).

# Setting Communications to AutoStart when an Operator Logs In (Single-PC Systems)

## The Auto-Start Communications Option

For a single-PC installation, you can have operators asked during login if they want the panel communications software to start automatically.

**Note:** This feature is supported only by the 'Prime' software version (single-panel licensing).

Client/Server Tip: For a client-server system, refer to "Client / Server Alternative" to follow.
(For details on software licensing, refer to "Software Activation and Licensing".)

This streamlines the process of initiating a panel connection to allow:

- Updating changes to a panel;
- Bringing the monitoring window up-to-date (and the activity logs for reporting);
- Checking status or controlling an item.

When started in this way, the operator will also be asked (when logging out, or shutting down the MONITOR ISM Director software) if they wish to shut down the communications software as well.

**Auto-Connect to Panel:** If an active / current communications session is set to "Stay Connected" and "AutoStart communications" is enabled, the software will attempt to reconnect automatically when an authorized operator logs in. For details on the "Stay Connected" selection, refer to "Activating Communications and Transferring Panel Settings", previous / above.

## Enabling the Auto-Start Feature

Open the **Tools** menu, and select **Options**. Then, ensure **Prompt to AutoStart/Stop Communication to the Panel** is selected, and click **OK**.

**Note:** If the "**T**ools" menu does not include the indicated selections (or if the "Options" screen contains camera settings), this means your Director software licensing supports client-server operation. (See "Client/Server Alternative", to follow.)

## Selecting (or Testing) the Auto-Start Option During Login

With "Prompt to AutoStart..." enabled:

- Exit from the software (open the **File** menu, select **Exit**, and respond to any additional prompts that appear);
- Restart MONITOR ISM Director, and perform a 'login';
- Respond with **Yes** when asked if you want to Auto-Start the communications software.

You should now be able to initiate a panel connection (as described previously / above).

**Tip:** If an active communications session had been set to "Stay Connected", the software will typically attempt to reconnect automatically.

## Client / Server Alternative

In a client-server system, panels can connect through any MONITOR ISM Director workstation. As such, there is no way to start communications when an operator logs in.

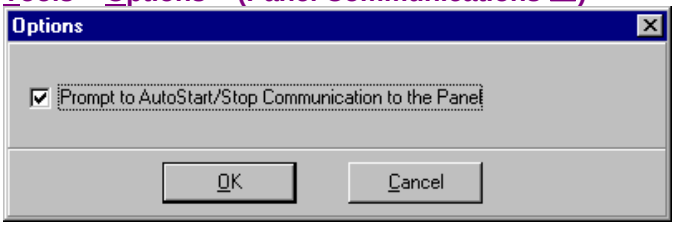
To ensure the 'server' and 'communications' software is available in a multi-PC system, you can create 'Shortcuts' to these files, and place them under "C:\Windows\Start Menu\Programs**Startup**" on each applicable PC.

The "MONITOR ISM Director-Server.exe" file, and "MONITOR ISM Director-Communication.exe" file can typically be found under C:\Program Files\MONITOR ISM Director V4.

(Right-click the file, select **"Send To"**, and then "**Desktop (Create Shortcut)"**. Then, go to the Windows desktop, locate the shortcut, and position and rename it as desired.)

**Tip:** The communications software can also be started manually at any time (on the specific PC): From the **Start** menu, select **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communication**.

**Tools ⇨Options ⇨(Panel Communications 🗀)**




- **Prompt to AutoStart/Stop Communication to the Panel:** Selecting this causes operators to be asked during login if they wish the communications software to be started automatically.

  When started in this way, the operator will also be asked (when logging out, or shutting down the MONITOR ISM Director software) if they wish to shut down the communications software as well.

  **Note:** This is supported only with single-PC installations.

---

**(During Startup)**

- **Yes:** Select this to have the communication software started automatically (now), and closed automatically when you exit from the MONITOR ISM Director software.
- **No:** Select this to work without panel communications for now.

**Tip:** You can manually start the communications software at any time: From the **Start** menu, select **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communication**.

# Administration and Maintenance

# Operators (People Who Can Use This Software)

## Operators

An operator is a person who has been given the authority to use the MONITOR ISM Director software. Each operator is given a 'login' name and password that provide access to specific items and features.

The permission-set assigned to each operator determines what features they can use, and which items will be shown on the desktop.

**Also See:** "Operator Permissions" (to follow).

Each operator can also select which main aspects of the desktop will be in-view when they are logged in. (See "Show Tree / Events / MyTools" in the selection-descriptions for this screen.)

## Adding/Setting up a New Operator

Select **Operator** from your MyTools bar, **or** click **[Management]** in the 'tree', open the **Operator** branch, and select **Operator**.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one operator at a time;
Grid View: All defined operators in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

You can also select "New Operator" from the bottom of the window (in forms view), or select the blank / grey operator at the bottom of the list in 'grid' view.

Then, refer to the selection-descriptions for this screen while entering and selecting your desired settings.

## Viewing or Changing Settings for an Operator

Select **Operator** from your MyTools bar, **or** click **[Management]** in the 'tree', open the **Operator** branch, and select **Operator**.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired operator at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid view, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

## Deleting an Operator

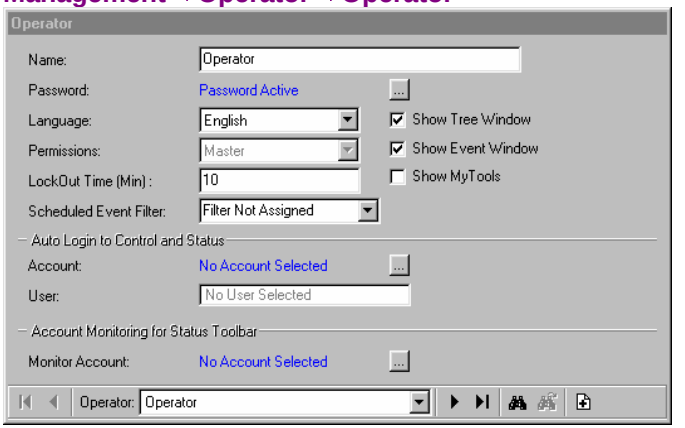
Select **Operator** from your MyTools bar, **or** click **[Management]** in the 'tree', open the **Operator** branch, and select **Operator**.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired operator at the bottom of the window. Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired operator in the list, and select **Delete**. When asked to confirm, select **Yes**.)

## Management ⇨Operator ⇨Operator




## Pick-List (bottom of the form)

- **Operator:** This is where you select an operator to view or edit. This area shows the name of each operator, once defined;

## On This Form

- **Name:** The name to be used when this person 'logs' into the MONITOR ISM Director software.
- **Password [ ... ]:** Allows setting or changing the password that this operator will have to enter during login. This must be at least 4 chars/digits (e.g., go4it).

  Be sure to select a memorable password, and/or have the operator change it right away to something they will remember.
- **Language:** The language to be used in menus, screens, and reports while this operator is logged in. (Languages are determined during installation--based on availability.)

  This setting also determines which language-version of the help file will normally appear, although this can be changed if desired (for the current work-session). For details, look for the **Language** selection from the **Help** menu in the "Desktop Reference".
- **Permissions:** This is a (previously defined) permission-set to be associated with this operator. This determines the features that will be displayed and/or available when this person is logged in.

  **Also See:** "Operator Permissions" (to follow).
- **Lockout Time (min.):** This sets the duration that the keyboard can remain untouched before the system will automatically lock-out operator access. (This helps to protect against unauthorized access to the system).

  **Note:** A selection of zero (0) will disable this feature.

  Lockout Mode Details: Refer to "Exiting, Logging Out, or Changing Operators" in the Welcome section.
- **Scheduled Event Filter:** This allows optionally selecting a "scheduled event filter" (defined previously) for this operator--to determine the types of messages they will be able to see on specific weekdays and time-of-day.

  Related Topic(s): Scheduled Event Filtering for Operators

---

- **Show Tree / Events / MyTools:** These set the desktop portions that will appear initially when this operator logs in.

  Each operator can change this (after logging in) by selecting the desired items on the main toolbar.

  The operator who is logged in can save any such desktop changes by opening the **View** menu, selecting **Desktop Settings**, and then **Save**.

### Auto-Login to Control and Status

- **Account [ ... ]:** When "Control and Status" is selected in the tree for a specific account, the operator is normally required to 'login' with a user ID and PIN. If an account is selected here, this operator will be automatically logged in as the user selected below when they open "Control & Status" for this specific account.

  Tip: For a system with only one account, this selection is automatically set for you. Note: This selection is **not** supported with the default highest-level operator ("Operator").
- **User:** The auto-login feature will log the operator into "Control & Status" as the user selected here. (Select the user-record pertaining to this specific operator.)

### Account Monitoring for Status Toolbar

- **Monitor Account [ ... ]:** This sets the account to be monitored by the status toolbar when this specific operator is logged in.

  This selection can also be changed at any time through the **[Monitor]** button on the toolbar. **Tip:** For a system with only one account, this selection is automatically set for you.

  For details on the status toolbar, refer to "Using the Status Toolbar".

# Changing an Operator's Password

## Quickly Changing Your Password

Open the **File** menu, and select **Change Password**. Then, enter the new password, press **Tab**, enter the password a second time, and press **Enter** (or click **OK**).

## Changing the Password for any Operator

Select **Operator** from your MyTools bar, **or** click **[Management]** in the 'tree', open the **Operator** branch, and select **Operator.**

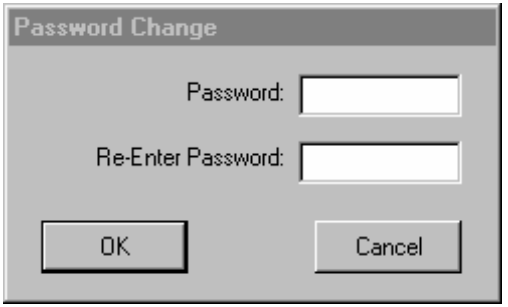
Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired operator at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid view, locate the desired operator in the list.)

Now, click the **[ ... ]** next to "Password". When the next screen appears, enter the new password, press **Tab**, enter the password again, and press **Enter** (or click **OK**).

If the desired operator is not listed, this means you do not have the authority to change their password.




- **Password:** The desired/new password for the operator.
- **Re-enter Password:** Enter the same password again (this helps protect against typing errors).
- **[Ok]:** Confirms the new password.
- **[Cancel]:** Aborts the password-change (keeps the previous one).

Be sure to select a memorable password, and/or have the operator change it again to something they will remember.

# Operator Permissions

Muti-Account Systems: Operator permissions are associated with account folders--allowing different types of permissions to be assigned to groups of accounts. **Accounts and account folders need to have been set up appropriately.** For details, refer to "Working with Accounts and Folders" (near the beginning of the Configuration section). Client/Server Systems: Permissions can also be **assigned for each specific client workstation**. In this case, each operator will be able to use only the features that are assigned to them **AND allowed for their workstation**. See: "Client Workstation Access and Permissions".

In the same way that user authorities determine what users can do, "operator permissions" determine the items and features that groups of operators will be able to use.

For each specific item, click once to assign **view** permission (magnifying glass), or click again to assign view and **edit** permission (pencil). If you click a 3rd time, this will clear the selection.

**Tip:** Some suitable 'templates' (permission types) are provided to give you a quick starting-point.

Permission to Use the **Wizards**: To use the configuration and communications Wizards (Tools menu), your operator permissions must grant "Permission Type: All permissions" for the specific account folder.

Related Topics: "New Installation? Try the Wizard!"

Technical Note: An operator cannot edit their own permissions, or assign settings they don't have to another operator. Items that are not available will either be not displayed, or grey in colour.

### Creating a New Operator Permission-Set

Select **Operator Permissions** from your MyTools bar, **or** click **[Management]** in the 'tree', open the **Operator** branch, and select **Operator Permissions**.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode. (Forms view is recommended here.)

Now, click **[+]** at the bottom of the form, or **right**-click the form, and select **Add New...** from the pop-up menu.

You can also select "New Permissions" from the bottom of the window (in forms view), or select the blank / grey operator permission at the bottom of the list in 'grid' view.

Then, refer to the selection-descriptions for this screen (and "right-click" menus) while entering and selecting your desired settings.

(Use your mouse to scroll through the settings in the lower right-hand portion of the screen.)

## Viewing or Changing Operator Permission Settings

Select **Operator Permissions** from your MyTools bar, **or** click **[Management]** in the 'tree', open the **Operator** branch, and select **Operator Permissions**.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode. (Forms view is recommended here.)

Select the desired 'operator permission' at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid view, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen (and "right-click" menus) while viewing or changing settings as desired.

**Tip:** To view the desired settings, use your mouse to scroll the screen to the applicable section.

## If you Need to Delete an Operator Permission

Before attempting to delete an 'operator permission', you must first check to ensure that it is not assigned to any operators (and assign a different one as necessary.)

The simplest way to do this is to:

- Go to/select the Operator portion of the 'tree': Select **Operator** from your MyTools bar, **or** click the **Management** button, open the **Operator** branch, and select **Operator**.
- Switch to 'Grid' view (click **Grid** on the toolbar).
- Scan through the list, checking for the specific operator-permission in the list;
- Assign a different permission group to any operators as required.

Now, select **Operator Permissions** from your MyTools bar, or in the tree--and use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired permission-set at the bottom of the window. Then, right-click a blank portion of the screen and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired 'Operator Permission' in the list, and select **Delete**. When asked to confirm, select **Yes**.)

Sample screens and selection-descriptions appear on the following pages.

## Pick-List (bottom of the form)

- **Operator Permissions:** This is where you select a permission-set to view or edit. This area shows the name of each permission-set, once defined;

## Top of the Form

- **Name:** A suitable name/description for this operator permission group (such as "Daily Admin")

## 🗀 Common Permissions 🗀

- These are permissions pertaining to the entire system (such as editing operators, backing up the database, etc.);

  Multi-**Account** Systems: These selections are always present—regardless of which account folders are selected in the next tab.

  Operator Permissions: This pertains to working with operator permissions **and** scheduled event filters (both under "Operator" in the tree).

  Shared Account Permissions: These pertain to users and/or holidays to be shared across multiple accounts. **Related Topic:** Users and Holidays Shared Across Multiple Accounts

## 🗀 Specific Permissions for *Selected Folder* 🗀

Settings on this tab pertain to the specific account folder selected.

**Tip:** Use your mouse to 'scroll' through the settings.

**(Multi-Account Systems) Account Folder Selection Area**: For a multi-account system, the left side of this form allows selecting a folder (parent or individual) to be associated with permissions that you select thereafter.

If nested account folders have been set up, subfolders start out with the same permissions as the 'parent' folder, and can be changed manually, as desired (a **green square** indicates changes have been made). Inherited settings for subfolders (NO green square) will be changed automatically by changing settings for the parent folder.

Pale/Faded-Looking Folder: This means no permissions are selected.

---

### Permission Type (Sample Templates)

- **Name:** This provides sample permission 'templates' as a starting point for common types of operators.

  **Tip:** Make your selection here first. Then use your mouse to scroll within the form (to see all items), and make any changes as desired. (Your permission template name will change to 'Custom' when you start making changes.)

  To Give Permission to use the **Wizards** (Tools menu): Select "All Permissions" (and **[Save]** without making any changes).

- **Global Account Permissions:** Management tasks such as editing users, schedules, holidays, etc., plus working with guard tours.

  Edit Accounts/Account Folders: For systems with multi-account licensing, this setting determines whether or not the specific operators will be able to edit the account folders and account names in the tree. **Tip:** To hide the account-folders portion of the 'tree' for operators with permission for only one account, ensure this is NOT selected.

  USER permissions (various): These pertain to individual tabs on the "Users" screen. "User Custom Field 1-5" (etc.) allows viewing or editing those specific fields. "Custom Fields" permission (only) is needed to initially define any of the custom user fields.

- **Panel Configuration Permissions:** Selections pertaining to setting up areas, and the physical items in a system (sensors, doors, etc.)

- **Control and Status:** Selections pertaining to viewing status or controlling various items, plus filtering the monitoring window, and monitoring guard-tours.

- **Reports:** Issuing the various types of reports: Activity reports, viewing or printing programmed settings (panel config.), etc.

  Panel Config. Reports: This requires the specific panel configuration permissions as well.

- **Communications:** Selections pertaining to panel communications, monitoring, status/control, and "Visual Director" (maps and cameras) -- ≥V4.0 software.

  Control and Status: Controlling items also requires the specific device control authorities associated with the **user** you log in as when opening the "Control & Status" feature. For details, refer to "Authorities for Users/Entrants".

## Right-click Menus

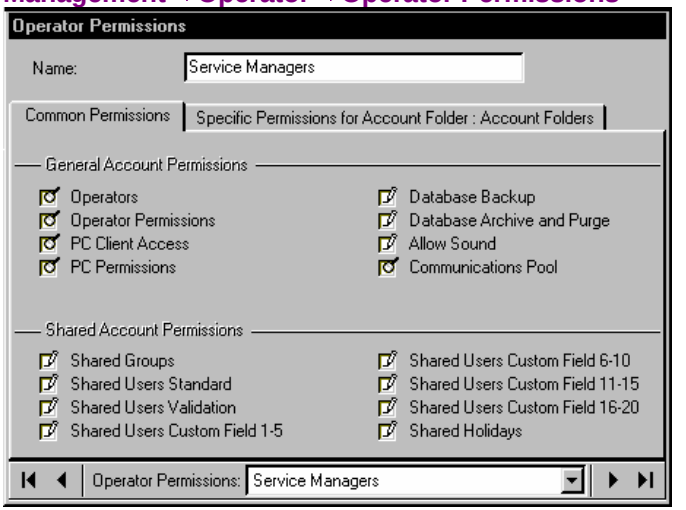
"Right-Click" means using the mouse button farthest from your body (unless you left-handed, but using a right-handed mouse).

### Right-clicking near the top of the Form

- **Cut Permission:** Copies the folder's permission settings into memory, and reverts the folder to its parent folder's settings (i.e., for a folder marked with a green square).

- **Copy Permission:** Copies the folder's permission settings into memory.
  Note: The "Cut", "Copy", and "Paste" functions do NOT use the Windows clipboard.
- **Paste Permission:** Applies previously cut or copied permissions to the specific folder. (See "Attention", to follow).
  Tip: The copy and paste functions allow transferring settings between operator permission-sets.
  **Attention:** Pasting permissions for **ANY** folder with NO green square will affect **ALL** folders in that permission-inheritance family (including the parent).
- **Delete Permission:** Reverts the folder to its parent folder's permission settings (i.e., for a folder marked with a green square).

## Management ⇨Operator ⇨Operator Permissions




**Legend/Reminder:**
Magnifying Glass: Permission to **view** the item.
Pencil: Permission to view and add/delete/**edit** the item.

## Right-clicking An Account Folder (2nd tab)

- **Cut all Permissions:** Copies permission settings for all account folders into memory, and then deletes the whole permission-set.
  Tip: You will be prompted to confirm the deletion.
- **Copy all Permissions:** Copies into memory the permission settings for all account folders within a permission-set.
- **Paste all Permissions:** Applies previously cut or copied permissions to all folders within a permission-set.
- **Add New all Permissions:** Creates a new (blank) permission-set. (Same as clicking **[+]**, or selecting "New Permissions" at the bottom of the form).
- **Delete all Permissions:** Deletes the whole permission-set.
  Tip: You will be prompted to confirm the deletion.
- **Find** and **Find Next:** Allows searching for a permission-set by name (same as the 'binocular' symbols at the bottom.

# Scheduled Event Filtering for Operators

## Introduction

Scheduled event filtering allows setting the types of messages each operator will be able to see during vs. outside of specific times.

Notes: • Operators with "Events Filter" permission will be able to temporarily override the scheduled filter settings; • Setting up this feature requires "Operator Permissions" permission; • You can set up any number of scheduled event filters (i.e., up to one for each operator, if desired); • When scheduled event filtering is in effect for the present operator, a clock symbol will appear on the **[ Filter ]** button at the bottom of the monitoring window.

Related Topic(s): • Limiting the Window to Show Only Specific Messages (Sorting and Filtering); • Operator Permissions

## Setting up Scheduled Event Filters

**1)** Select **[Management]** in the tree.

**2)** Open the **Operator** branch (click the [+], or double-click "Operator"), and select **Scheduled Event Filter**.

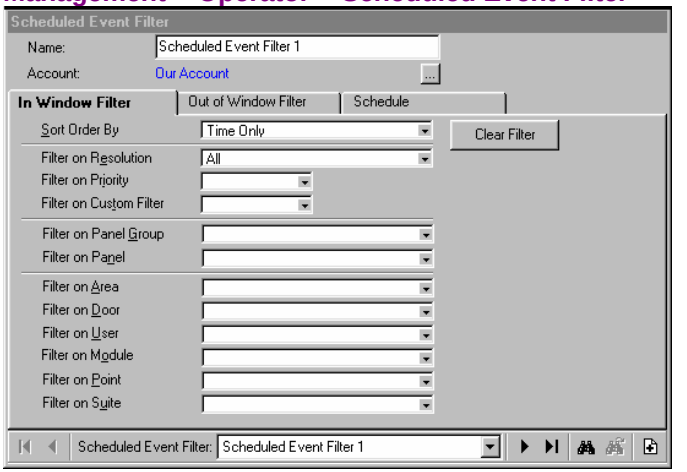
**3)** Refer to the selection-descriptions for this screen while making your selections.

Note: 'Grid' view does not apply to this screen.

## Assigning Scheduled Event Filters to Operators

Once the "Scheduled Event Filters" have been set up, go to the **Operator** screen, and ensure one is assigned to each operator, as desired.

Related Topic(s): See the section on "Operators", previous.




## Pick-List (bottom of the form)

- **Scheduled Event Filter:** This is where you select a "Scheduled Event Filter" to view or edit. This area shows the name of each filter/profile, once defined.

## Top of the Form

- **Name:** Enter a suitable name/description for the scheduled filter profile here.
- **Account:** This is the account that this event filter will be used with (allows the software to display the correct device names, etc. in the selections that follow). Click **[...]** to change this setting.

  Note: Scheduled event filters are intended for use with individual accounts. If the operator logs into a different account, filtering selections that pertain to specific items (areas, doors, etc.) will apply to the items at the same ID number in that account.

## In Window Filter 🗀

This pertains to event filtering for associated operators **during** the times set under **Schedule**🗀.

- **Sort Order By:** This allows listing messages in order by date/time only, or showing 'unresolved' (and higher priority) events first.

---

- **[Clear Filter]:** Removes all filters--i.e., returns to the factory settings (and closes the 'filter' window).
- **Filter on Resolution:** This lets you have the list include events depending on whether or not they have been 'resolved' (i.e., dealt-with).

  All: This shows all events--including ones not associated with the comment/resolution feature (i.e., not set as 'resolvable').
- **Filter on Priority:** This allows limiting the window to show only events of a desired priority value (or range).
- **Filter on Custom Filter:** This allows limiting the window to show only events of a desired 'custom-filter' value (or range).

  **Also See:** To assign priorities, 'Custom Filter' values, and other parameters, refer to the configuration topic: "Customizing How Events are Displayed".
- **Filter on Area, Door, etc:** For events pertaining to a specific person or door, etc., select the desired item(s) here.

## Out of Window Filter 🗀

This pertains to event filtering for associated operators **outside of** the times set under **Schedule**🗀.

For details on the various selections, refer to **Scheduled Filter**🗀, previous/above.

## Schedule 🗀

- **Days of the Week** (with Associated Time-Intervals): The days of the week showing the time intervals for each day. (To add an interval, right-click the specific day. To adjust an interval, drag the interval and/or its end-points to the desired position.)

  **Tips:** You can copy and paste (or delete) time intervals using the right-click menu. Up to 6 unique time-intervals can be applied as desired throughout the weekdays in the schedule for each filter profile.

  Work Shift that Spans Midnight: In this case, each day will need two intervals to cover the times before and after midnight.
- **On Holidays**: This allows you to set how scheduled event filtering will operate on defined holidays. (Scheduled as usual, or have one of the filter 'tabs' in effect for the entire day.)

  Related Topic(s): Holidays and Time-Change Dates

# Schedules for User-Access and Area Automation

## Schedules

Schedules are customizable time-windows for an account that can:

- Allow areas to 'open' (disarm), and 'close' (arm) automatically;
- Set times when authorized entrants will be able to enter assigned areas;
- Allow doors to unlock & relock, and/or change their operating criteria automatically.

On defined holidays, schedules can be blocked, or customized to meet your specific needs. If custom times are desired, additional schedule(s) must be set up. (See the "Holiday Schedules" description for details.)

For 24-hr access (including holidays), select this directly in the authority profile for applicable users (there is no need to set up a "24-hr" schedule. For details, refer to "Authorities for Users/Entrants".

## Adding a Schedule

Select **Schedules** from the MyTools bar, **or** click your site/account button in the tree, and select **Schedules**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one schedule at a time;
Grid View: All defined schedules in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

**Tip:** You can copy all settings for a schedule, and paste them into another one: Right-click the 1st one (near the bottom if in 'Forms' view), and select **Copy**. Then, select a blank/new schedule from the list, right-click again, and select **Paste**. After 'pasting', change the name and any settings as desired. **Tip:** 'Copy' and 'Paste' are also available from the **Edit** menu.

## Viewing or Changing Settings for a Schedule

Select **Schedules** from the MyTools bar, **or** click your site/account button in the tree, and select **Schedules**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired schedule at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid view, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

### Working in the Forms View

In forms view, the schedule is shown graphically, for Sunday through Saturday. Add a new time-interval by right-clicking a specific day, and selecting **Create New Time Interval**. Then, drag the interval and/or its end-points to the desired location. **Tip:** Copying, pasting, and deleting is also allowed when you right-click a specific time-interval.

Repeat this process until the desired times are set up for all days in the schedule. (You can use up to 6 unique time intervals throughout each schedule.)

### Working in the 'Grid' View

In 'Grid' view, the focus is on the separate time-intervals, and the days each one is used. For each required time interval, enter the start and end time, and then select the days it will be used (tab & space-bar, or mouse-click). **Tip:** Times can be entered as 0010-2350 (the colon and leading zeros are inserted automatically for your convenience).

Repeat this process until all required time intervals have been set up.

### If you Need to Delete a Schedule

Before attempting to delete a schedule, first check to ensure that it is NOT assigned to any 'Doors', 'Areas' or 'Authorities', and that it is not assigned to the 'Holiday' portion of another schedule.

This can be done by viewing the topics for "Areas", "Doors", "Authorities", and "Schedules" in '**grid**' view, and checking all "Schedule" columns for the specific one. For details, refer to "Areas and Related Settings", "Doors, Readers, and Related Settings", and "Authorities for Users/Entrants".

Alternatively, you can issue "Area", "Door, "Authority", and "Schedule" reports, and check for the specific Schedule in the listing. For details, refer to the table of contents for the desired 'Reporting' topic(s).

Now, select **Schedules** from the MyTools bar, **or** click your site/account button in the tree, and select **Schedules**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

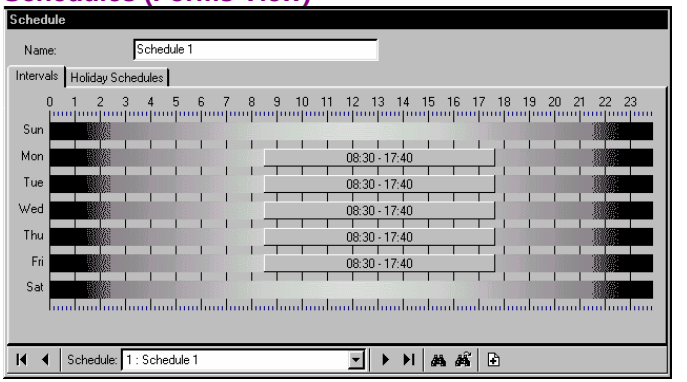
Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired schedule at the bottom of the window. Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired schedule in the list, and select **Delete**. When asked to confirm, select **Yes**.)

Sample screens and selection-descriptions appear on the following pages.

## Schedules (Forms View)




## Pick-List (bottom of the form)

- **Schedule** (bottom of form)**:** This is where you select a schedule to view or edit. This area shows a reference number assigned by the system, and the name of the selected schedule, once defined;

## Top of the Form

- **Name:** A suitable name/description for the schedule, or its intended use;

## Intervals

- **Days of the Week** (with Associated Time-Intervals): The days of the week showing the time intervals for each day. (To add an interval, right-click the specific day. To adjust an interval, drag the interval and/or its end-points to the desired position.)

  **Tips:** You can copy and paste (or delete) time intervals using the right-click menu. Up to 6 unique time-intervals can be used as desired throughout the weekdays in each schedule.

Split Shift: Be sure to include an interval for after a meal break—assuming the break is not part of the 'required attendance' times.

Work Shift that Spans Midnight: It's simplest to use grid view, entering the start and stop times in the order they occur (e.g., Start time: 23:00, Stop time: 07:00), and select the weekdays pertaining to the **start** time.

## Holiday Schedules

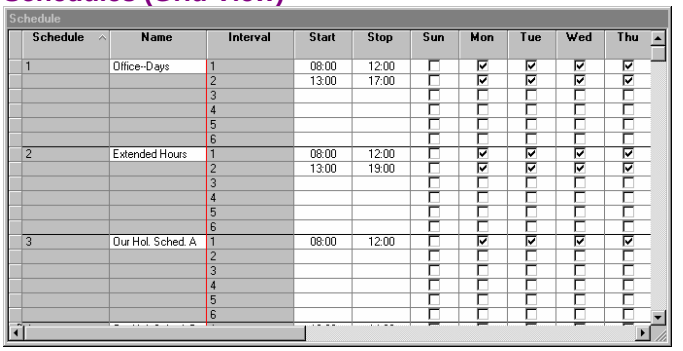
- **Start of Holiday:** This allows selecting whether holiday operation will begin at midnight, or not until this schedule expires (i.e., for time-intervals that span midnight).
- **Schedule on Type 1/2/3 Holidays:** How the schedule will treat each type of holiday (No access / as regular weekday / 24 hr access, or as per the times in another schedule).

  **Tip:** Pause the mouse cursor over a Schedule in the list to view the associated times.

  For details on setting up holidays, refer to "Holidays and Time-Change Dates).

**Note:** For schedules assigned **only** within other schedules (for use on holidays), this setting will be ignored.

## Schedules (Grid View)




- **Schedule:** A reference number assigned by the system;
- **Name:** A suitable name/description for the schedule, or its intended use;
- **Interval:** A reference number for the unique time interval (1-6);
- **Start** and **Stop:** The time that the specific time-interval begins or ends (the interval is 'active' between these times). Times are entered as 0010-2350 (the colon and leading zeros are inserted automatically for your convenience);

Split Shift: Be sure to include an interval for after a meal break—assuming the break is not part of the 'required attendance' times.

Work Shift that Spans Midnight: It's simplest to use grid view, entering the start and stop times in the order they occur (e.g., Start time: 23:00, Stop time: 07:00), and select the weekdays pertaining to the **start** time.

- **Start of Holiday:** This allows selecting whether holiday operation will begin at midnight, or not until this schedule expires (i.e., for time-intervals that span midnight).
- **Days of the Week:** The weekdays during which the time interval will take effect. (Use **space-bar** to toggle; **Tab** to select next.)
- **Holiday 1/2/3 Schedule:** How the schedule will treat each type of holiday (No access / as regular weekday / 24 hr access, or as per the times in another schedule).

**Tip:** Pause the mouse cursor over a Schedule in the list to view the associated times.

For details on setting up holidays, refer to "Holidays and Time-Change Dates).

**Note:** For schedules assigned **only** within other schedules (for use on holidays), the times set for the applicable weekday will be used (nested holiday-schedule settings will be ignored).

# Holidays and Time-Change Dates

Holidays (and/or time-change dates) Shared Across Multiple Accounts: Beginning with Director V4.20, groups of holidays can be set up once, and then applied to multiple accounts. For a shared holiday, changes made here will affect multiple accounts. To set up or change a 'shared holiday', refer to "Users and Holidays Shared Across Multiple Accounts".

## Holidays

Holidays are defined dates for an account that:

- Automatically change the system time between Daylight Savings Time and Standard Time on the applicable days, **or**;
- Allow blocking or setting different times for scheduled features on these dates (area openings, user access to doors, and automated door unlockings).

**Exception:** Users with "24-hr" access and 'disarm' authority for the specific area can gain entry on holidays. For details, refer to "Authorities for Users/Entrants".

Holiday Deployment: See the "Holiday Type" selection for details on system operation during holidays.

MONITOR ISM Director supports 32 'holidays', with the 1st two reserved as the dates to switch between 'Daylight-Savings' and 'Standard Time' (optional).

**In Grid View, Small 1st Column with Blue Boxes**: Blue rectangles indicate holidays that apply to multiple accounts (shared holidays).

Related Topic: "Users and Holidays Shared Across Multiple Accounts".

## Setting the Dates for Daylight-Savings and Standard-Time (Optional)

Select **Holiday/Daylight Savings** from the MyTools bar, **or** click your site/account button in the tree, and select **Holiday/Daylight Savings**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one item at a time;
Grid View: All defined items in a list.

Choose Holiday 1 for Daylight Savings, or Holiday 2 for Standard Time. (Forms view: bottom of the window).

**Tip:** If these items are not listed, click **Filter** on the toolbar, and re-check the listing.

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

## Adding a Holiday

Select **Holiday/Daylight Savings** from the MyTools bar, **or** click your site/account button in the tree, and select **Holiday/Daylight Savings**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one item at a time;
Grid View: All defined items in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

## Viewing or Changing Settings for a Holiday

Select **Holiday/Daylight Savings** from the MyTools bar, **or** click your site/account button in the tree, and select **Holiday/Daylight Savings**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired Holiday at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

### If you Need to Delete a Holiday (or Time-Change Date)

Select **Holiday/Daylight Savings** from the MyTools bar, **or** click your site/account button in the tree, and select **Holiday/Daylight Savings**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

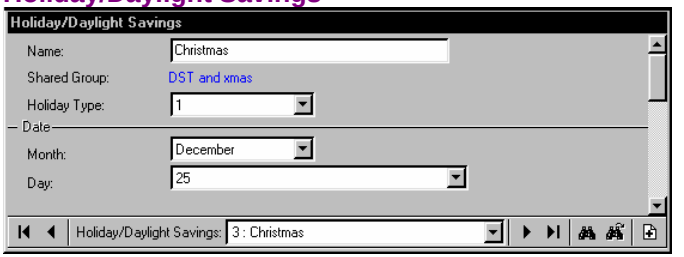
In 'Forms' view, select the desired Holiday at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired Holiday in the list, and select **Delete**. When asked to confirm, select **Yes**.)

To cancel the Daylight-Savings / Standard-Time changes, you can either delete Holiday #1 or #2, or set one of them as "Disabled". Then, check the current time on your computer, and make any required changes. If the PC time had to be changed, be sure to update your accounts as well. For details, refer to "Checking Status and Controlling Items".

## Holiday/Daylight Savings




## Pick-List (bottom of the form)

- **Holiday/Daylight Savings** (bottom of form)**:** This is where you select a holiday to view or edit. This area shows a reference number assigned by the system, and the holiday name, once defined;

## On This Form

- **Name:** A name or suitable description for the holiday or time-change date. (The description for holidays 1 & 2 are fixed as "Daylight Savings Time" and "Standard Time").

  **Daylight-Savings / Standard Time:** For holidays 1 and 2, this lets you enable or disable the daylight-savings feature.

- **Shared Group:** For holidays that apply to multiple accounts (shared holidays), the name of the shared-holiday group appears here;

  Related Topic: "Users and Holidays Shared Across Multiple Accounts".

- **Holiday Type:** This can be set as "No Access", or type 1, 2, or 3. This allows, for example, access to be blocked (and areas to be fully 'armed') on certain holidays, with access being allowed during limited times on other holidays, as per your requirements.

  The 'Holiday Type' setting does not appear for holiday 1 & 2 (i.e., the dates to switch between standard-time and daylight-savings time).

  **No Access:** Blocks user-access and all scheduled features during the holiday (as if all schedules have no valid times on that day). Exception: This setting does not affect scheduled event-filtering for operators. (Holiday operation is defined separately for event filters.)
  Ref: [Management], ⇨Operator, ⇨Scheduled Event Filter 🕮 Scheduled Event Filtering for Operators

  **Type 1, 2, or 3:** How these days are handled is determined by the holiday settings within each schedule. Ref: (My Account) ⇨**Schedules** 🕮 Schedules for User Access and Area Automation (previous).

### Date

- **Month:** The month for the holiday or time change.
- **Day:** The day for the holiday or time-change.

  For holidays 1 and 2 (i.e., the dates to switch between standard-time and daylight-savings time), this changes to an "Xth weekday" selection.

# Authorities for Users/Entrants

Users Shared Across Multiple Accounts: Beginning with Director V4.20, groups of users can be set up once, and then applied to multiple accounts. This involves reserving blocks of authorities for shared users, assigning authority ID#s to specific shared users, and defining appropriate authorities (at the correct ID#s) for each account. For details, refer to "Users and Holidays Shared Across Multiple Accounts".

## User-Authorities for an Account

Authorities determine:

- When and where blocks of users will be able to enter controlled areas, and;
- Which tasks they will be able to perform:
  + At system keypads, and;
  + In the "Control & Status" screens, and;
  + Per items on maps (Visual Director) **≥V4.0**.

For an operator to control items through this software, they must also have "Control and Status" permission. For details, refer to "Operator Permissions".

Up to four 'profiles' can be set up for each authority, allowing permissions to be customized across different area groupings.

Reference Notes:

Authorities also determine which Control & Status selections will be accessible to each operator (since 'Control & Status' requires entering a valid user ID+PIN).

For details on assigning authorities to users/entrants, refer to the section on "Users".

**Suite-Security Keypad** authorities are selected in the screen for each specific user. For details, refer to the section on "Users".

Additional authorities (and users) would typically need to be set up for a '**Panic Token**' application. For details, refer to the descriptions under "Special Attributes".

For an overview on how user-authority settings operate relative to area settings and door settings, refer to "Understanding Access-Controlled Areas".

## Working in the Authority Screen

Within each 'Profile' tab, select areas on the left side of the form, and make your desired selections on the right.

**To see more of the on-screen form:**

- Ensure the monitoring window is hidden (click **[Events]** on the toolbar), and/or;
- Enlarge the centre of the screen by dragging the thin bar between the "Authority-selection" box, and the monitoring window title-bar downwards.

  (To restore the screen when finished, click **Reset** on the toolbar.)

## Adding an Authority

Select **Authorities** from the MyTools bar, **or** click your site/account button in the tree, and select **Authorities**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode. (Forms view is recommended here.)

Forms view: Details for one authority at a time;
Grid View: All defined authorities in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

**Tips:** You can select, clear, or 'invert' all settings using the right-click menu from within your specific 'profile' tab). You can also copy all settings for an Authority, and paste them into another one:
Right-click the 1st one (a blank area above the 'tabs' if in 'Forms' view), and select **Copy**. Then, select a blank/new authority from the list, right-click again, and select **Paste**. After 'pasting', change the name and any settings as desired. **Note:** 'Copy' and 'Paste' are also available from the **Edit** menu.

## Viewing or Changing Settings for an Authority

Select **Authorities** from the MyTools bar, **or** click your site/account button in the tree, and select **Authorities**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired Authority at the bottom of the window. **Tip:** You can also use

the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid view, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

### If you Need to Delete a User-Authority

Before deleting an Authority, check to ensure that it is not assigned to any **Users**.

This can be done by viewing the "Users" topic in '**grid**' view, and checking the "Authority" column for the specific one. For details, refer to "Users (Entrants / Panel Users)".

Alternatively, you can issue a 'User' report, and check for the specific Authority in the listing.

For details, refer to the table of contents for the desired 'Reporting' topic(s).

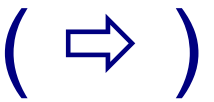
Now, select **Authorities** from the MyTools bar, **or** click your site/account button in the tree, and select **Authorities**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired Authority at the bottom of the window. Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired Authority in the list, and select **Delete**. When asked to confirm, select **Yes**.)



## Pick-List (bottom of the Form)

- **Authority:** This is where you select a user-authority to view or edit. This area shows a reference number assigned by the system, and the name of the selected authority, once defined;

## Top of the Form

- **Name:** A suitable name or description for the authority (e.g., Manager);

---

## 🗀 Profile 1-4 🗀

### Area Window on the Left

- **Areas** (left side of form)**:** This is where you select the areas to be accessible by persons assigned to this authority. (This pertains to area & device control, logging in at a keypad, and/or gaining entry at readers associated with one of the selected areas).

(Within a 'profile' tab, select the desired area(s). Then, select all authority settings to be associated with the chosen areas.)

**Tip:** To help manage multiple profiles for sites with a large number of areas, any areas that are presently selected in another profile (within the same user authority) will appear with a 'grey' check-box. As well, for profiles with **any** areas selected, the 'profile' tab will appear in bold.

Multi-**Panel** Systems: Area choices can be displayed as a single list, or on a panel-by-panel basis. For details, refer to "Other Desktop Choices".

### Top of a Profile Form

- **Schedule:** The schedule to determine the days/times applicable users will be able to gain entry† to (and/or disarm) the selected areas. With "Follow Area", the schedule for each individual area is used. **Tip:** Pause the mouse cursor over a schedule in the list to see the settings for that schedule.

† Door-access scheduling is actually tied to the "Door Class" feature. The DEFAULT settings for "out" readers (reader 2 for each door), provide 24-hr egress for all valid cards.
Related Topics: "Door Class 🗀", to follow/below.

Areas set to "Allow Out of Schedule Opens" can be entered after-hours if the user has the applicable 'Disarm' authority.

Selecting "**24 hour**" as the schedule provides access to enter and/or disarm the selected area(s) 24 hrs/7 days per week, including holidays. To enter an area that is armed during their assigned times, users must also have the applicable 'Disarm' authority for the specific area.

To set an area to 'Allow Out of Schedule Opens' (or not), refer to "Areas and Related Settings".

To define a schedule, refer to "Schedules for User Access and Area Automation".

---

### 🗀 "Permissions (within a Profile) 🗀

- **Silence Alarm:** Acknowledging an alarm at a panel.
- **Status:** View status for the system and points in the area(s);
- **History:** View the event history for the applicable area(s);
- **Test:** Perform a system test from an LCD keypad;
- **Work Late:** Ability to delay a 'scheduled close' time for the selected area(s). (This is done in ½ hour increments.)
- **Bypass Points:** Telling the panel to ignore/bypass specific points in the applicable areas (and/or remove the 'bypass' later). This allows arming an area with a faulty sensor, broken window, etc.

This is supported only if the point-type is 'bypassable'. For details, refer to the sections on "Input Points".

- **Suspend Schedule:** Indefinitely suspend schedule(s) for the applicable area(s).
- **Auto-Remove Bypass:** Automatically removes any 'bypasses' that are in effect when an

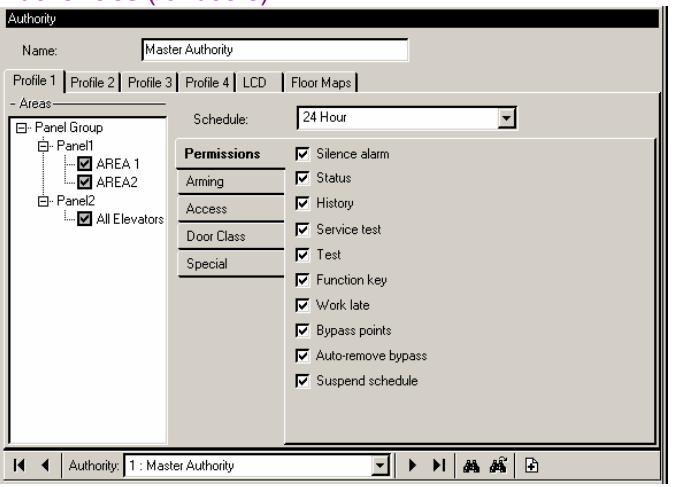
associated user is granted entry. This helps to ensure that any faulty sensors are not forgotten;

- **Service Test:** This provides the ability to edit the panel date and time through a system LCD keypad. Also, when a user with this authority views system status at an LCD keypad, the "Verify User" option can be used to clear alarms (similar to the 'service user'.
- **Function Key:** The ability to use the programmed hot-keys (function keys) 6, 7, 8, 9, or 0 for an area that requires this authority (function keys 1-5 are available for all users/areas);

  Whether or not an area requires this authority is set through the "Require Function Key PIN" selection under "Areas and Related Settings".

  What each function key does is set up under "Programmable Outputs".

## Authorities (for users)




## Arming (within a Profile)

- **In Schedule (Off / Stay / On):** The arming/disarming levels that applicable users will be able to invoke while the schedule is active (or 24 hr if not scheduled);
- **Out of Schedule (Off / Stay / On):** The arming/disarming levels that applicable users will be able to invoke outside of the schedule (applies only if the authority is scheduled above);

  Off: Only 24-hr and life/safety sensors monitored;
  Stay: Perimeter doors / sensors monitored (plus 24 hr / life-safety);
  On: All sensors monitored (including interior motion detection).
- **Auto Disarm on Valid Token:** This allows customizing the "Auto-Disarm" feature for an area—depending on who is entering (i.e., persons assigned to this 'Authority'). Selections are provided for "the area being entered" vs. "all areas assigned to this authority", and Disarm to "Stay" or "Off".

  If the authority is scheduled (above), a different selection can be in effect when the schedule is active, versus outside of the chosen schedule.

  This feature must also be enabled for each specific area. For details, refer to "Areas and Related Settings".

## Access (within a Profile)

- **Area access is permitted:** The area arming levels for which the assigned users will be able to enter the selected areas. (i.e., when the area is Off, armed to Stay, and/or fully armed to ON).
- **Master Override:** This allows a person such as a security officer to enter at any door that would normally deny access.

  Items Overridden: 'Wrong time' (and door class settings), 'cards locked-out', APB (if NOT set for strict enforcement), readers in 'dual-custody' or 'escort' mode (and allows the person to act as an escort).

  Items NOT Overridden: 'Wrong area or floor', card/PIN mode, 'strict APB', and door 'interlock' issues.
- **Manual Door Command In Schedule:** Ability to command doors through LCD-keypads (or this software) while the schedule is active (or 24-hr if not scheduled).
- **Manual Door Command out of Schedule:** Ability to command doors through LCD-keypads (or this software) outside of the schedule (applies only if the authority is scheduled above).

  Elevators/Lifts and Floors: The "Manual Door Command" selections apply to elevator (lift) and floor control as well (if applicable).
- **Escort Privilege:** Whether or not users assigned to this authority will be considered as "Escorts" (for use with "Escort-Required Visitors" (to follow), and the "Escort" reader mode for

doors in the selected areas).

For details, refer to "Reader Mode" in the door configuration section.

- **Visitor (Escort Required):** With this selection, the person is tracked as they 'badge' throughout the facility, but access is not granted until a valid escort's card is also presented.

  To Block a Visitor from Using LCD Keypads: Locate them in the 'Users' screen, and ensure their PIN is blank.

  Type of Cards that can Escort Visitors: This can be changed as desired (the present setting is shown on-screen in blue).
  Related Topics: Under "Account-Wide Panel Settings", look for "Setup🗀", then "**Escort-Required Mode**".

  Turnstiles: The escort would typically have to 'badge' a second time to let themselves in (antipassback not supported for this application).

  Escort/Dual-Custody for Readers: Escort mode is also supported for all cards at specific readers. "Visitor" cards are denied access at readers set for "Dual Custody". Related Topics: "**Reader Mode**" in the reader configuration section for doors and/or elevators (lifts).

  Misc: The 'visitor' setting is not available for escorts (and vice-versa). As well, do not select "Master Override" (previous/above)--as this will override the visitor/escort feature.

---

## 🗀 Door Class (within a Profile) 🗀

- **In / Out of Schedule**, and **Class A/B/C):** These settings restrict access to doors of a specific 'class' (A, B, and/or C), and/or optionally block after-hours access to the specific areas (except users with 'Master Override' authority). If scheduled, a different set of door-classes can be in effect when the schedule is active (In Schedule) versus outside of the chosen schedule (Out of Schedule).

  For 'ordinary' scheduled door access, select "In Schedule" ⇨A✓, B✓, C✓; and "Out of Schedule" ⇨None. For 24-hr access, either select A✓, B✓, C✓ for "Out of Schedule" as well, **or** set the schedule to 24-hr.

  Door class restrictions can also be customized for individual readers.
  Related Topics: "**Enable Class Checking**", and "**[Class Map]**" in the reader configuration section for doors and/or elevators (lifts).

  Elevators (Lifts): This setting pertains to elevators as well (controlled floor access).

  If a user-schedule is not specified (i.e., Follow Area), the selections remain in effect 24 hrs (subject to the users' ability to access each area at a specific time).

  Related Topics: "**Schedule**", previous/above.

---

## 🗀 Special (within a Profile) 🗀

- **Panic Token:** This designates associated user 'access tokens' as being a panic / duress indication (instead of an access request).

  In this case, the applicable 'access tokens' will typically be separate wireless (RF) pushbuttons (with appropriate detectors in the required areas). This is typically used for areas such as parking garages.

- **Wandering Patient:** Sets associated users to be tracked as they approach exterior doors, or other areas of concern.

  With this type of 'user', the 'access token' will typically be a wireless wristband (with appropriate detection in door frames).

  When the patient approaches, an alarm can be triggered, and the door can optionally lock as they approach. For details, refer to the "Special" tab near the end of "Doors, Readers, and Related Settings".

- **Reset Door Alarm:** Provides associated staff members with the authority to cancel a 'Wandering Patient' alarm by presenting their (applicable/compatible) token at the specific door.

## LCD

- **LCD Name:** A shorter version of the name to be displayed at LCD keypads. This is assigned automatically, and can also be changed if desired (max. 12 chars., plain text).
- **User Ranges:** This is the range of users to be accessible/editable through system keypads (by users associated with this specific authority being edited). (See note.)
- **Authority Ranges:** This is the range of user authorities to be accessible/editable through system keypads (by users associated with this specific authority being edited). (See note.)

**Tip:** To provide 'edit' authority for **all** user or authority-ranges, click the **[...]** button, right-click the screen that appears, and click "**Select All**". When finished, click **[Ok]**.

**Note:** The 'User Range' and 'Authority Range' settings allow a facility with multiple tenants (e.g., row of shops) to be managed as a single account. This requires that the selected blocks of user-IDs and authorities be appropriately reserved for the users in each tenant facility.

## Floor Maps

(systems with elevators and floors)

- Systems with elevator controllers provide controlled access to system floors. You can select up to four sets of floors (floor maps), and assign a schedule to each one to determine when the associated users will be able to access each set of floors.

(Select a floor map tab and a schedule, and then click the floors to be accessible during the applicable times.)

Panel Revision Requirements: ≥ **V3.2** panel firmware is recommended. Panels with V3.0 firmware support the first floor profile only, and the schedule selection will be ignored. With V3.0x panels, floor access can be scheduled only via:

+ The schedule associated with the area-profile (previous/above);
+ Schedules in the area and reader configuration;
+ Desecure schedules in the elevator and floor configuration.

For floor access, the area for the elevator reader(s) must be included in at least one of the "Profile" tabs (see previous/above), and access will be provided only when the schedule for the elevator's area AND the assigned floor schedule are satisfied.

# Custom Information Categories for Users (Custom User Information)

Users Shared Across Multiple Accounts: To implement shared 'custom-user-fields', these fields must be defined with the same usage and order for all applicable accounts, and they must be set as 'single-line edit' fields. **Related Topic:** "Set up any Custom User Fields for Shared Users".

## Custom User Fields

Custom user-fields allow creating up to 20 additional categories for users (e.g., Department, Position, etc.).

**Note:** Custom user information categories pertain to all users for a specific account.

These allow sorting lists of users by Department, etc. when working in "Grid" view, and can also be referenced when issuing time and attendance or activity reports.

## Viewing or Entering These Settings

Select **Custom Fields** from the MyTools bar, **or** click your site/account button in the tree, open **Users** (click the "**+**"), and select **Custom Fields**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Now, refer to the selection-descriptions while viewing or entering your desired settings.

**Note:** Grid view is not supported for this topic.

**Tip:** Your settings will be saved automatically when you move to a different screen or topic.

## Checking the User Screen for the New Fields

Select **Users** from the MyTools bar, **or** click your site/account button in the tree and select **Users**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Now, select the **Custom** tab to view any defined custom fields.

## Deleting (Hiding) Custom User Fields

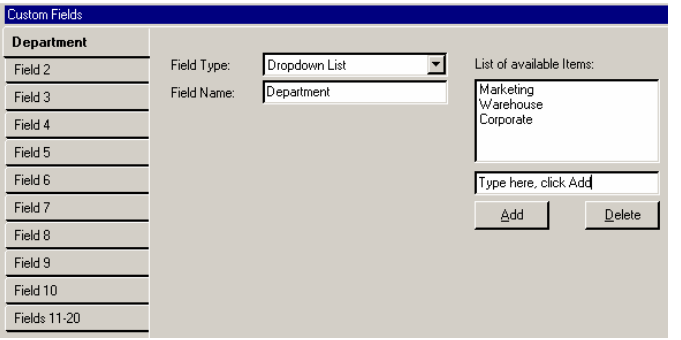
Select **Custom Fields** from the MyTools bar, **or** click your site/account button in the tree, open **Users** (+), and select **Custom Fields**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Now, select the 'tab' for the item you wish to have removed from the 'User' screen, and set the "Field Type" to "None". (See "Field Type" if you need more information.)

**Tip:** Your changes will be saved automatically when you move to a different screen or topic.

## Users ⇨Custom Fields




### Field 1, 2, 3, ...20 (Select the tab for the new/desired field)

- **Field Type:** The type of new field to appear at the bottom of the User screen. (Make your selection from the list.);
- **Field Name:** The name to appear next to the field on the User screen (such as "Position", "Department", etc.);

### (Additional Settings for "Drop-down Lists" only)

- **List of Available Items:** Available selections that have been entered and "Added" (see the following items);
- **Enter a New Item:** A selection to be added to the list of choices. (Enter your text in place of "Enter a New Item", and click **[Add]**.)
- **[Add]:** Adds an entered item to the list;
- **[Delete]:** Deletes a selected item. (Select the item in the list, and then click **[Delete]**.)

# Users (Entrants / Panel Users)

Users Shared Across Multiple Accounts: Beginning with Director V4.20, groups of users can be set up once, and then given access to multiple accounts. For a shared user, changes made here will affect multiple accounts. To set up shared users, refer to "Users and Holidays Shared Across Multiple Accounts".

**Tip: For details on the photo-badging option, refer to the next topic.**

## Users

Users are the persons authorized to use system keypads and/or gain entry to controlled areas. Each user can have unique authorities, keypad language, etc.

The user topic includes information pertaining to each user, and provides access to the optional card-badging feature.

• The number of users to be supported depends on your software version and licensing. For details, refer to "Software Activation and Licensing", and "System Capacities". • Additional users (and authorities) would typically need to be set up for a '**Panic Token**' application. For details, see the "Special Attributes" selections under "Authorities for Users / Entrants".

## Visitor-Related Features

A number of features are provided for handling visitors in your facility:

- Authority profiles can be set up to determine the doors and features the visitors will be able to access;
- Each card can be assigned an activation and expiry date and time;
- Cards can be set as "Escort Required" to allow tracking them without providing access to controlled areas on their own;
- You can leave a visitor's PIN blank to block access to LCD keypads;
- Reader(s) can be set to disable different types of cards when presented.

## Suite-Security Keypad Users

Users to be associated with a suite-security keypad (monitored apartment or facility) are assigned in a special way. Blocks of 8 users are reserved for each keypad when adding and setting up the keypads.

These users **must** be defined within the appropriate user-ID range associated with their suite security keypad.

To check (or set) the user-ID range for a specific suite-security keypad refer to "Suite-Security Keypads and Related Settings".

## Multi-Tenant Facilities

A facility with multiple tenants (such as a row of shops) can be managed as a single account. This requires that blocks of user-IDs and authorities be reserved for the users in each tenant facility.

The authority to edit specific blocks of users and user-authorities can be set within each user-authority profile. This allows persons within each facility to use an LCD keypad to edit their own users, without allowing them to edit users in other facilities.

For details, refer to "Authorities for Users / Entrants".

## Users who can Enter During Communications-Failure'

Up to 10 users can be set up for door-access in the event of any door control module(s) being unable to communicate with the system panel. If using this feature, be sure to make a list of the No./ID the system assigns to these users as you go along.

For details, refer to "Door Fall-back Mode" under "System Card-Access Settings", and the section on "Fall-Back Users".

Elevator (Lift) Cabs: This feature is also supported for individual elevator (lift) cabs. To enable "Fallback Mode" for an elevator, refer to "Elevators (Lifts) and Associated Readers".

## Viewing and Sorting a List of Users

Select **Users** from the MyTools bar, **or** click your site/account button in the tree, and select **Users**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

If the screen shows only one user (forms view), click **Grid** on the toolbar to see a full listing of the users (Grid view). If any column headings are **red**, right-click within that column and select **Remove Column Filter**. Now, you can:

- Click one of the column headings to sort the list by that item (user name, etc.);
- Scroll through the list as desired;
- Select an individual user and click the **Form** toolbar-button to access that user's form;
- Limit the list to show an individual user, or groups of users (details to follow).

**Tip:** You can use the scroll-bar at the bottom of the window to view additional columns to the right.

Additional fields can be defined for users (such as Position, Department, etc.). For details, refer to "Custom Information Categories for Users".

**Green or Yellow Rows in Grid View**: Partial panel updates are indicated in the user list with special colours: Yellow: Partial updates pending (some panels have not been updated); Green: Data for the user has been changed while partial updates were pending (the user's settings at the panels will be overwritten on next update).

**Small 1st Column with Blue Boxes**: Blue rectangles indicate users that apply to multiple accounts (shared users). Related Topic: "Users and Holidays Shared Across Multiple Accounts".

**Checking for Database Conflicts (esp. large systems)**: Differences between the software database and settings entered locally through an LCD keypad can be identified by selecting "Check Database for Conflicts" from the **Tools** menu. For details, search for that topic in the index.

## Limiting the List to Show Specific User(s)

Access the user-list (Grid view) as described above. Then, right-click within a specific column (such as "Name"), and select "**Filter on Column**" from the pop-up menu. Now, enter or select the desired criteria, and press **Enter**. **Tip:** You can search for user names that begin with certain letter(s) by entering the letter(s) and an asterisk (e.g., " **s*** ").

To return the listing to include all users / entrants, click **Refresh** from the toolbar, or right-click within any column(s) that are **red**, and select **Remove Column Filter**.

## Adding a User/Entrant to the System

Select **Users** from the MyTools bar, **or** click your site/account button in the tree, and select **Users**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one user at a time;
Grid View: All defined users in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

## Viewing or Changing Settings for a User/Entrant

**Sample screens and selection-descriptions appear on the following pages.**

Select **Users** from the MyTools bar, **or** click your site / account button in the tree, and select **Users**.

Multi-**Account** Systems:
First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired User at the bottom of the window.

**Searching for a Specific User:** To search for a specific card number, or for a person's first or last name (or the 1st few characters): Click the 'binoculars' symbol, enter your search criteria, and click **[Find]**. (Use the "*" symbol for partial name searches--e.g., nam*.)

(In Grid view, view and sort the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

## Deleting a User/Entrant

Before deleting a User, check to ensure that they are not assigned under **Fallback Users**.

This can be done by viewing the "Fallback Users" topic in '**grid**' view, and checking the "Name" column for the specific user. For details, refer to "Fall-Back Users...".

Alternatively, you can issue a 'Fallback User' report, and check for the specific User in the listing.

For details, refer to the table of contents for the desired

'Reporting' topic(s).

Now, select **Users** from the MyTools bar, **or** click your site/account button in the tree, and select **Users**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

In 'Forms' view, select the desired User at the bottom of the window. Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired User in the list, and select **Delete**. When asked to confirm, select **Yes**.)

**Forms View or Grid View?**

Grid view is best for viewing a list of users, and/or searching for users with a specific assigned value.

Forms view is best for adding a new user, or viewing or changing settings for one user at a time.

## Pick-List (bottom of the Form)

- **User:** This is where you select a user to view or edit. This area shows a reference number (ID) assigned by the system, and the user's name, once defined;

  The user ID number is required to gain access at a system keypad, and to use any "status & control" features of this software. (The user's PIN number is also required. See "Change PIN", to follow.);

## Top of the Form

- **First Name:** The user's first name (given name), or a description of the card/token;
- **Last Name:** The user's last name (family name);

---

- **Shared Group:** For users that apply to multiple accounts (shared users), the name of the "shared-user group" appears here;

  Related Topic: "Users and Holidays Shared Across Multiple Accounts".

## 🗀 Standard 🗀

- **System Authority:** The 'authority' profile to be assigned to the user. This determines what keypad features the person will be able to use, and/or when and where they can gain entry.

  **Tip:** Pause the mouse cursor over an 'Authority' in the list to view the associated settings. For details on setting up authorities, refer to "Authorities for Users / Entrants".

- **Shared Authority:** For users that apply to multiple accounts (shared users), the name of the "shared-authority group" appears here;

  **Note:** Authorities themselves are not shared. The 'shared authority group' determines which authority (ID#) in the account will be used.
  Related Topic: "Users and Holidays Shared Across Multiple Accounts".

- **[Change PIN]:** Allows setting or changing the **P**ersonal **I**dentification **N**umber which allows the user to perform tasks at a system keypad, and/or enter at a controlled door (4 or 5 digits).

  The last two digits of each PIN must be different numbers. (This allows users to indicate they are being forced to login at a keypad (**duress**) by reversing the last two digits of their PIN.)

  To Block a Visitor from Using LCD Keypads: Leave their PIN blank.

  User PINs pertaining to a single **suite-security keypad** must be unique (different).

  For details on setting whether PINs are to be 4 or 5 digits, and whether or not duress signalling is to be supported, refer to "Account-Wide Panel Settings".

- **Language:** The language for user prompts at LCD keypads when accessed by this user;

  Languages are determined during installation—based on availability.

**Card Number:** The card ID number embedded within this user's access card or token (1 - 4 294 967 295).

Logon via Card Number: The system can be set for keypad and door access using this number (typically where the card number matches a fixed health number or employee number).
Related Topics: Under "Account-Wide Panel Settings", look for "🗀 Setup 🗀", then "**User Logon Mode**".

Firmware revisions needed for card IDs with more than 7 digits: ≥**V3.2** panel firmware, and ≥**V1.5** door/elevator controller firmware.
✍: **V3.2** panels: MaxID=999999999;
≥**V3.31** Panels: MaxID=As above.

- **Card Version:** This is the version number for this user's card;

  This optional field allows fixed-ID cards to be re-issued if lost or stolen. For more information (or to enable this feature), refer to "System Card-Access Settings". (Tip: Look for "AutoUpdate Card Version", and "Card Version".)

  This feature requires ≥**V3.2** panel firmware, and ≥**V1.5** door/elevator controller firmware.

- **Extended Delay/Challenged:** Whether or not the 'extended' door unlock (and 'held-open') settings should apply when this user is granted access at a controlled door.

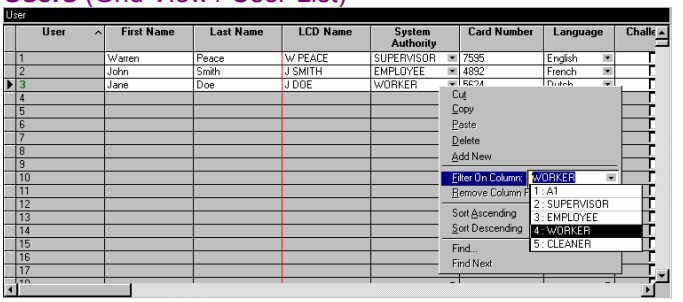
- **LCD Name:** A condensed version of the name to be displayed at LCD keypads. This is assigned automatically, and can also be changed if desired (max. 12 chars., plain text).

  **Exception:** For panel memory-configurations (feature-sets) that do not support user names, the LCD name will appear as "U00xx" as per the user-ID. To view or change the panel "Feature-Set", refer to "Account-Wide Panel Settings".

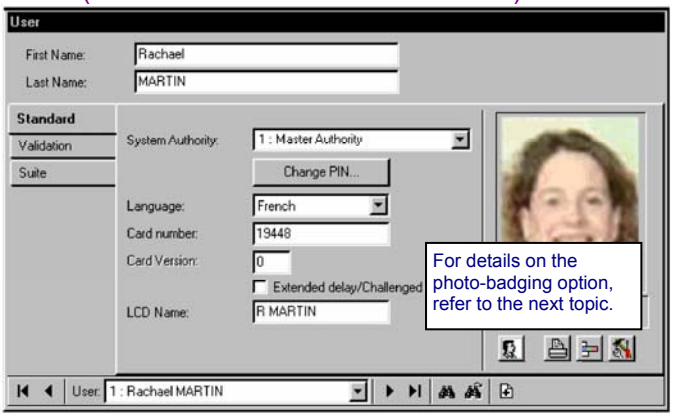
---

- **(Cardholder Photo and Related Settings):** Items pertaining to the photo-badging option are covered separately (to follow).

## Users (Grid View / User-List)




## Users (Forms View / Individual User Forms)




## Validation

### Valid User Period

- **Valid On:** The beginning date/time that this user's card, and ID/PIN can be used (or "Now / Immediate").

  Tip: See the notes that follow re: 'Pop-up Calendar' and 'Time Values'.

  **Pending Enrolment:** The card is presently invalid, but will be enabled if **accepted** at a reader that is set for "Card Enrolment".

  Related Settings:

  - Account Information, ⇨Setup, ⇨Card Action **(Ignore Pending Enrolment)**. See: Account-Wide Panel Settings.
  - Configuration, ⇨Doors, ⇨In Reader, ⇨**[Card Action]**. See: Reader 1 & 2 Settings for a Door.

- **Invalid On:** The expiry date/time for this user's card, and ID/PIN (or "Forever / Permanent").

Pop-up Calendar: Click the button to the right of the date to use this.

Time Values: Time values (hours) apply only with specified validation and invalidation dates for periods of less than 6 months.

## Custom xx

### (systems with custom user-fields)

Blocks of 5 additional (optional / custom) user information categories as defined through the "Custom Fields" screen (these may include Position, Department, vehicle license, etc.).

These items can be used when sorting or filtering lists of users (In Grid View), and can also be referenced by various types of Time & Attendance reports. For details on setting up these custom user fields, refer to "Custom Information Categories for Users".

## 🗀 Suite 🗀

(systems w/suite-security keypads)

### Authority Level Settings

Note: Support for suite-security keypads is optional (enabled through the license-manager software). This feature also requires going to "Account Information" in the tree, and selecting "feature-set" **5** or higher, and 'suite security'.

**Related Topics:**

+ "Software Activation and Licensing".
+ "Account-Wide Panel Settings".

- **Belongs to Suite:** This is the apartment/keypad associated this user (if applicable). For more information, refer to "Suite-Security Keypad Users" near the beginning of this section.
- **Authority Level:** Pre-set suite-security keypad user types:
  + System Authority Only: No access to the suite-security system;
  + Suite-Security Unassigned: This is for a pending/reserved user. (No keypad access, but can be changed by a person with "Suite-Security Master" authority.)
  + Other selections: As per the authority settings shown on-screen.
- **Authority Settings:** This shows the authorities associated with the "Authority Level" selected above. These pertain to the tasks that each user will be able to perform at the keypad in their unit.

## The Photo-Badging Option

With the photo-badging feature, personnel photos (and signatures) can be captured and included on the screen for each user. Selections are also provided for printing photos and other information on cards, as well as designing the layout for the information and graphics to appear on sets of cards.

The ability to capture or link images is a standard feature, while designing and printing cards is optional--subject to your software licensing.

This feature works with many common types of capture devices and card printers (as discussed in the computer requirements section).

Note: To allow using the photo-badging option, the card printer and any capture devices must be installed as per the manufacturer's instructions (download the latest drivers if you have access to the internet).

Licensing is managed through the small 'activation key' plugged onto the PC that contains the software database--in conjunction with the license manager software included with MONITOR ISM Director. For details on upgrading, refer to "Software Activation and Licensing".

### Capturing a person's Photo:

Tip: The following steps can also be used to photograph a person's pre-written signature (select **[Capture Signature Image]** instead of [Capture Image] ).

- Find the user form for the specific person as described previously/above;
- Click the 1st button (face symbol) under the photo area on the right side of the screen;
- With the person in front of the camera, click **[Capture Image]**. Adjust the camera (or person) as needed, and click **Capture Image** when ready.
- In the next screen, make any desired adjustments, and click **OK** when finished.

  For more information, refer to the **[Capture Image]** item-description.

### Linking to Existing Image Files (such as photos taken with a digital camera):

Tip: The following steps can also be used to link the photo of a person's signature (select **[Capture Signature Image]** instead of [Capture Image] ).

Photo-images that are already available on your PC can be linked to each applicable user as desired.

File Types Supported: Most common types of image

files are supported--including BMP, PCX, JPG, etc. Exception: "LZW"-style TIFF files are **not** supported (due to licensing issues). For reasonable results, the image files should be 100kb or larger. Note: To improve performance, image resolution is adjusted when each file is imported.

### Steps:

- Find the user form for the specific person as described previously/above;
- Click the 1st button (face symbol) under the photo area on the right side of the screen;
- Click **Select Capture Profile**;
- Ensure "**Load Image from File**" is selected as your capture-device, and click **[OK]**;
- Now, click **[Capture Image]**, and locate and select your desired photo-image;
- Click **[Open]**. When the next screen appears, make any desired adjustments, and click **OK** when finished.

For more information, refer to the **[Capture Image]** item-description.

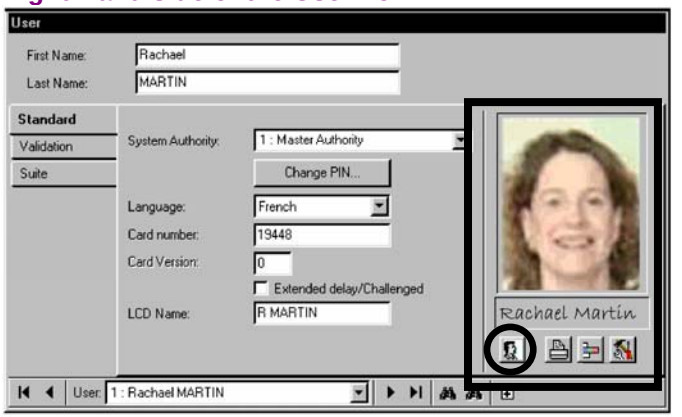
### Creating a Signature Image:

Tip: This can be done using a writing tablet (recommended), or your mouse.

- Find the user form for the specific person as described previously/above;
- Click the 1st button (face symbol) under the photo area on the right side of the screen;
- With the specific person seated in front of the PC, select **[Sign Signature]**.
- Have them sign their name using the writing tablet or mouse.

For more information, refer to the **[Sign Signature]** item-description.

### Right-Hand side of the User Form



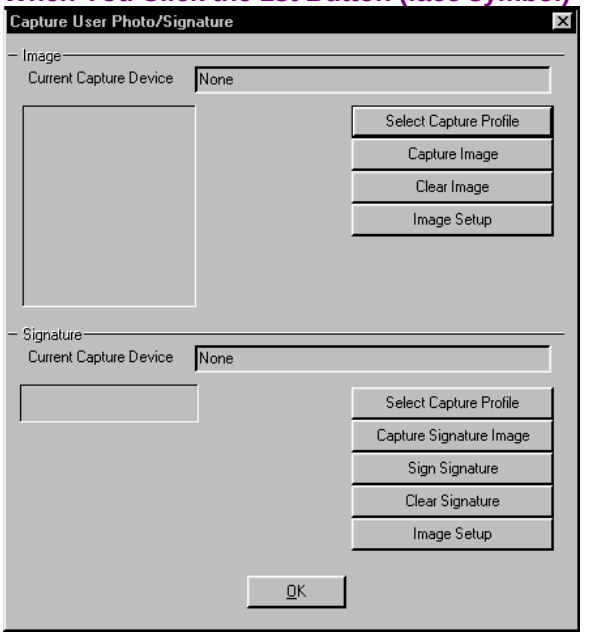

## Standard Photo-Badging Selections

- **(person's photo-image):** The captured image of the specific person (this can be captured directly, or linked from a file);
- **(person's signature-image):** The person's captured signature image (this can be captured directly, or linked from a file);
- **[1st button]** (face symbol)**:** This opens a form with a number of selections for capturing user photos and/or signatures;

  Printer, and Tools buttons: See "Optional Features..." to follow/below.

### When You Click the 1st Button (face symbol)

## When You Click the 1st Button (face symbol)




## Image

- **Current Capture Device:** This shows your presently-selected image-capture device (or "load image from file");
- **(image area):** This shows your tentatively-selected user photo;
- **[Select Capture Profile]:** This allows selecting a different image capture device (or "load image from file");
- **[Capture Image]:** This allows capturing the person's photo, or linking to an image file (e.g., from a handheld digital camera);

  If prompted to select a capture profile: Select your image-capture device (or "Load Image from File") and click **OK**.

  Settings Details: For information on the settings in this screen, press **F1**. Tip: You can drag the dotted border to reframe your image.
- **[Clear Image]:** This removes any image from the image area (e.g., to remove a person's image from the user screen);
- **[Image Setup]:** Allows you to change various technical aspects of the specific image file. This can be used to set the 'aspect ratio' (height-to-width ratio) of the captured and printed images. (In general, leave other settings as-is.)

  Tip: Click **Image Setup**, select "Photograph" and click **[Edit]** ).

## Signature

**Current Capture Device:** This shows your presently-selected image-capture device (or "load image from file");

- **(image area):** This shows your tentatively-selected signature;
- **[Select Capture Profile]:** This allows selecting a different image capture device (or "load image from file");
- **[Capture Signature Image]:** This allows photographing the person's signature, or linking to an image file (e.g., from a handheld digital camera);

  If prompted to select a capture profile: Select your image-capture device (or "Load Image from File") and click **OK**.

  Settings Details: For information on the settings in this screen, press **F1**. Tip: You can drag the dotted border to reframe your image.
- **[Sign Signature]:** This allows using a writing tablet (recommended), or your mouse to enter your signature.

  (signature area): This shows your signature as you enter it. **Tip:** It is best to watch the screen while signing (may take a little practise).

  [Clear]: Click this to clear the screen and try signing your name again;

  [Cancel]: Click this to abort the task, leaving the presently assigned signature in place (if present);

  [Done]: Click this to insert your new signature onto the user form.
- **[Clear Signature]:** This removes any image from the signature area (e.g., to remove a person's signature from the user screen);
- **[Image Setup]:** Allows you to change various technical aspects of the specific image file. This can be used to set the 'aspect ratio' (height-to-width ratio) of the captured and printed images. (In general, leave other settings as-is.)

  Tip: Click **Image Setup**, select "Signature" and click **[Edit]** ).

# Optional Features (Photo-Badging Option)

## Printing a Card

(Requires the Photo-Badging Option)

- Find the user form for the specific person as described previously/above;
- Ensure the displayed image and other settings are correct;
- Click **[Print Badge]** (printer symbol) -- bottom-right portion of the user screen. Then, locate and double-click your previously saved card design template (**.gdr** file).
- In the next screen, select your printer (plus any desired properties) and click **OK**.
- In the print preview window, magnify and/or view your sample as desired. To print the card, click **Print** on the toolbar (printer symbol).

  For more information, refer to the **[Print Badge]** item-description.

## Designing Cards

(Requires the Photo-Badging Option)

- Open the User screen with any user showing on-screen;
- Click **[Create Badge]** (tools symbol) -- bottom-right portion of the user screen, and design your new card layout as desired, or open a previous one to edit. When finished, be sure to save your settings (**F**ile, **S**ave).

  For more information, look for "**[Create Badge]** (tools symbol)" in the item-descriptions.

---

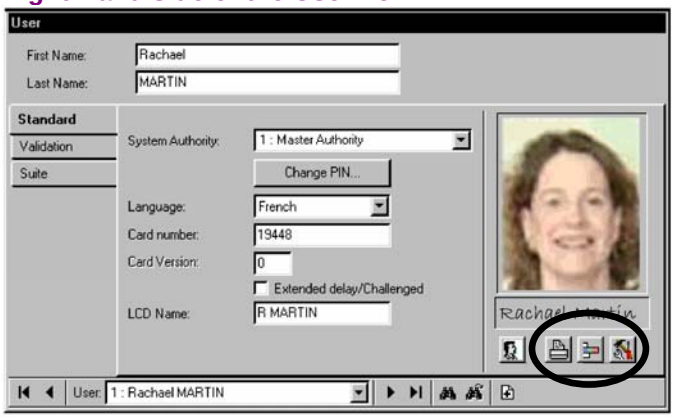
- **[Print Badge]** (printer symbol)**:** This allows selecting a card-layout file, and printing the person's photo and data onto an access card;

  Tip: The printer set-up button in the print-preview window provides access to additional settings (after you select a printer and click **OK**).

- **[Card Printer Encoder Setup]** (coloured bands symbol)**:** This provides additional settings for a card printer encoder.

  Tip: Additional information is provided separately. (Click the button, and then press F1 for help.)

### Right-Hand side of the User Form




- **[Create Badge]** (tools symbol)**:** This allows designing card templates (i.e., setting up the layout and data to appear on sets of cards).

  Tips: • This launches as a separate program. For details on using this software, refer to its on-line help and/or printed manual (as applicable).

  - You can create a new layout, or open an existing one to edit.
  - Look to the right of **K O** near the right-hand end of the toolbar. This field allows inserting (or converting) common user-data fields instead of plain text via the **T** button.
  - For multiple items printed as one field: You must first set up an 'expression'. • **Edit**, ⇨**Define Expression**. • Select a field and click the "Up Arrows" button. • Type a "+" before each additional item, and enclose any additional text in double-quotes. Example: Last Name+", "+First Name
  - *Card Number*: Whenever you see 'Card Number' enclosed in asterisks (*), this pertains to magstripe encoding for use as access cards. For other card uses (or to print the card number), select 'Card Number' without the asterisks.
  - Magstripe Encoding (card-access vs. other uses):
    1) Refer to **[Card Printer Encoder Setup]**, previous/above;
    2) Go to **Edit** ⇨**Card Encoding**;
    3) Select the 'track' (Track 2 is typical/common);
    4) Select the desired item:
       - For magstripe access cards: *Card Number* (with asterisks);
       - For other uses: Desired item (e.g., 'Card Number');
    5) **[Add Field]**, **[OK]**.

# Fall-Back Users (Can Enter During Comms Failure)

## Fall-Back Users for a Panel

At each panel, various card-access modes are supported for use in the event of a communications failure (i.e. a door or elevator controller module being unable to communicate with the system panel). This feature (door fallback mode), includes a selection for letting up to 10 specific users gain entry during the 'comms failure'. These users are known as "Fall-Back Users".

Elevator (Lift) Cabs: This feature is also supported for individual elevator (lift) cabs. **See:** Elevators (Lifts) and Associated Readers

## Accessing the "System Access" Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **System Access** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and "System" (**+**), and select **Access**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Enabling 'Fall-Back User' Mode

Access "Configuration⇨System⇨Access" as described previously, and ensure you are in "Forms" view (**Form** / **Grid** toolbar-button).

Select the "**Special**" tab, and then ensure **Door Fallback mode** is set as "10 fallback users". When finished, click **[Save]**.

"**Fallback User**" will now appear at the bottom of the 'Configuration' area of the tree (for the specific panel).

To enable "Fallback Mode" for an elevator (lift) cab, refer to "Elevators (Lifts) and Associated Readers".

## Accessing the "Fallback Users" Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Fallback Users** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Fallback Users**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Assigning a New fall-Back User

Access "Configuration⇨Fallback Users" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one fallback user at a time;
Grid View: All assigned fallback users in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

## Viewing or Changing Fall-Back User Assignments

Access "Configuration⇨Fallback Users" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired person at the bottom of the window. **Tip:** You can also use the 'browse' buttons to scan through the defined Fall-Back Users.

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

## Deleting / Cancelling a Fall-Back User Assignment

Access "Configuration⇨Fallback Users" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired person at the bottom of the window. Then, right-click a

blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

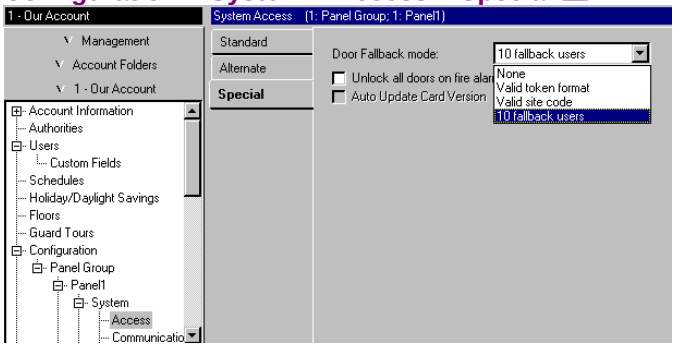
(In Grid View, right-click the desired person in the list, and select **Delete**. When asked to confirm, select **Yes**.)

**Note:** This does NOT delete the user from the system, but rather de-selects them as a 'fall-back' user.

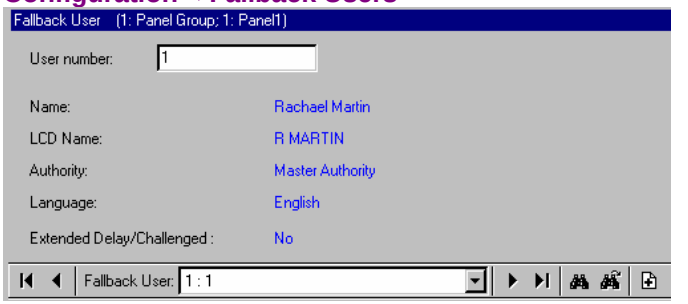
To delete a user from the system, refer to "Users (Entrants / Panel Users)".

- **Door Fallback Mode:** Cards to be granted access if the door controller module is unable to communicate with the main panel. (Set this to "10 Fallback Users").

## Configuration ⇨System ⇨Access ⇨Special 🗀




## Configuration ⇨Fallback Users




## Pick-List (bottom of the form)

- **FallBack User**: This is where you select a fallback user to view or edit. This area shows a reference number assigned by the system (1-10), plus the user No./ID once the user has been assigned.

## On This Form

- **User Number:** The user No. / ID as assigned by the system when the specific user was set up.
  **Tip:** After entering the user ID, click elsewhere on the form to see the details on that user.

  Exception: For a "User Logon Mode" set to "Card #", this field will be asking you to enter the **Card Number** instead.
  Related Topics: Under "Account-Wide Panel Settings", look for "🗀 Setup 🗀", then "**User Logon Mode**".

### Remaining Settings

- The rest of this form contains details on the specific user (as 'read-in' from the **Users** screen).

For details on setting up Users, refer to "Users (Entrants / Panel Users)".

# System Maintenance Tasks

## Password and Personal ID Number (PIN) Issues

### Default Password

This software includes a default operator password that should be changed right away to ensure only authorized persons will be able to access the system.

Default Operator Name & Password: **Operator**, **1234**

### Changing the default operator password

- Log in as the default operator;
- Open the **File** menu, and select **Change Password**;
- Enter the new password, press **Tab**, and enter the password again.
- When finished, press **Enter** once again (or click **Ok**).

Be sure to select a password that will be easy for you to remember.

### Default Service PIN

Similarly, each account will have a default service PIN that allows a service technician to perform various tasks through a system keypad. This should be changed for each account, and updated to the specific panels.

### Changing the Default Service PIN for an Account

- Log in as the default operator (or anyone with permission to change the service PIN);
- Select **Account Information** from the MyTools bar, **or** click your site/account button in the tree, and select **Account Information**.
- Select the "**Service PIN**" tab.
  Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.
- Click **[Change Service PIN]** on the form.
- Enter the new service PIN, press **Tab**, and enter the PIN again.
- When finished, press **Enter** once again (or click **Ok**).

**Tip:** Select a service PIN that will be easy for you to remember, and be sure to make any service technicians for the specific accounts aware of this change.

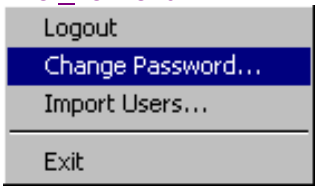
For details on updating the panel(s) with the new service PIN, refer to "Panel Communications and Updates".

- **Password:** The desired/new password for the operator.
- **Re-enter Password:** Enter the new password again (this helps protect against typing errors).
- **[Ok]:** Confirms (sets) the new password.
- **[Cancel]:** Aborts the password-change (keeps the previous one).

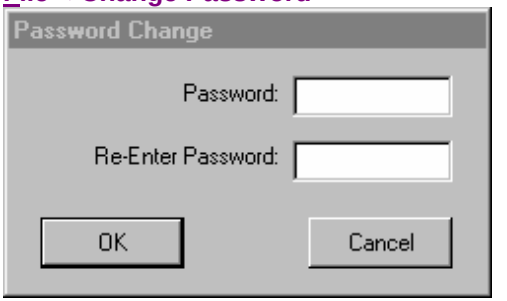
Be sure to select a password that will be easy for you to remember.

**Tip:** Be sure to stress the importance of keeping passwords a secret to all operators.

## The File Menu




## File ⇨Change Password




---

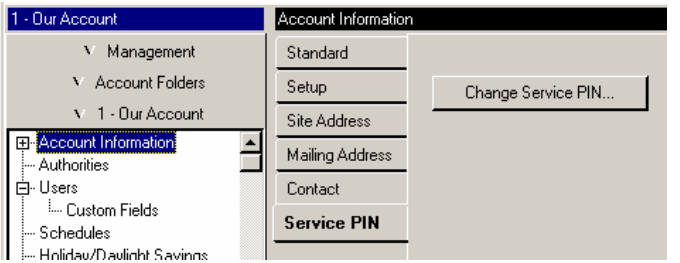
- **PIN:** The desired/new service PIN.
- **Re-enter PIN:** Enter the new PIN again (this helps protect against typing errors).
- **[Ok]:** Confirms (sets) the new service PIN.
- **[Cancel]:** Aborts the PIN-change (keeps the previous one).

**Tip:** Select a service PIN that will be easy for you to remember, and make any service technicians for the specific accounts aware of this change. As well, be sure to remind all users about the importance of keeping their PIN a secret (especially service technicians).

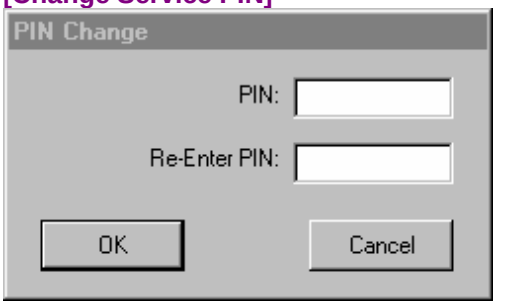
**Note:** Local configuration through an LCD keypad is supported in single-panel systems set to "Feature-Set" 1 – 4 (up to 1000 users). The service PIN, however, can be changed **only** through the software (any changes done locally will be ignored / overwritten).

For details on the "Feature-Set" parameter, refer to "Account-Wide Panel Settings", and/or "System Capacities".

## Account Information ⇨Service PIN 🗀




## [Change Service PIN]



# Large Systems--Checking for Software vs. Panel Differences / Conflicts

## Differences between the Database and Individual Panels

Especially with large systems that may communicate infrequently with the individual sites, panels can become out of sync with the software database as time goes on.

## Checking for Database Conflicts

To check for database vs. panel conflicts, open the **Tools** menu, and select **Check Database for Conflicts**. Then, refer to the item-descriptions for this screen while viewing the list.

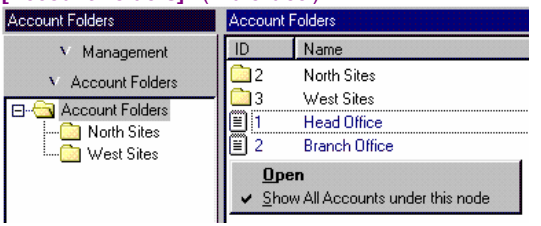
If logged into Multiple Servers: This feature pertains to one server at a time. (Go to **[Servers]** in the 'tree', and double-click your desired server or an associated account.)

## Finding an Account (by ID), and Correcting Conflicts

To locate an account by ID-number, select **[Account Folders]** in the 'tree'.

If you have multiple Account Folders: **Right**-click a blank area in the **right-hand** side of the screen, and ensure "Show All Accounts Under this Node" is selected. **Tip:** To sort by account IDs, click the column heading.

**[Account Folders]** (in the 'tree')

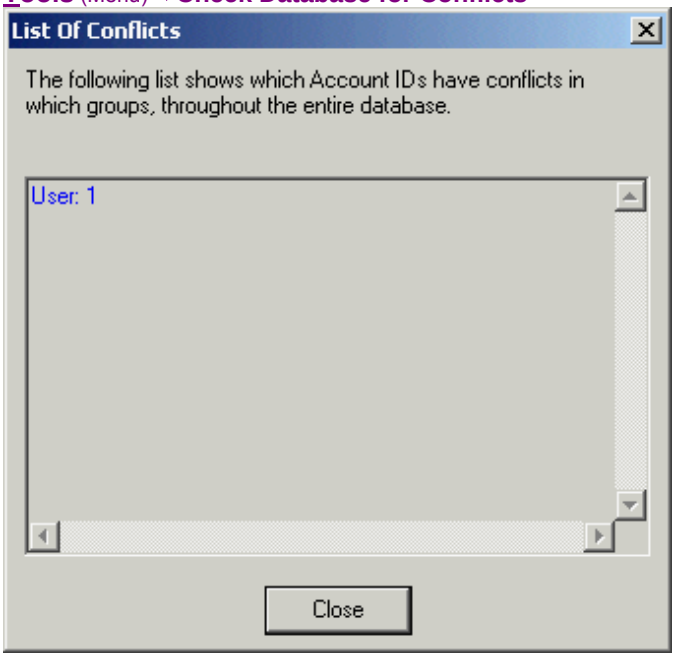



Then, locate (and double-click) the account in the list on the right-hand side of the screen.

To correct a conflict, select the specific topic through the 'tree' or MyTools bar (such as "User"), and follow the conflict resolution screen(s) that appear.

For details on responding to an individual conflict resolution screen, click the specific screen and then press **F1** (or check the index for a topic on correcting conflicts).

**Tools** (Menu) ⇨**Check Database for Conflicts**




**Updating/Synchronizing Panels:** For details on setting up a communications session with a panel, and transferring or synchronizing data, refer to "Panel Communications and Updates".

This screen shows a list of conflicts between the software database, and settings stored at the individual sites/panels.

- **Form name**, **Account ID**: Listed items pertain to the topic/form that contains a conflict, and the ID number of the specific **account** (NOT the item/user ID).

Panel vs. software conflicts should be corrected before you proceed with any additional database maintenance steps.

# Client/Server Systems:
# Checking to See Who Else is Logged onto the Database

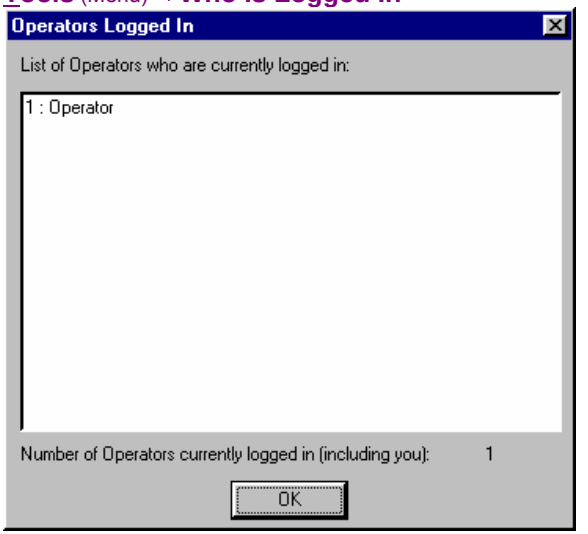
To check/repair the system database, all 'copies' of the MONITOR ISM Director software, and panel communications software must be shut down (i.e., on all MONITOR ISM Director PCs).

You can check to see if any other operators are presently logged onto the central database by opening the **Tools** menu, and selecting **Who is Logged In**).

If logged into Multiple Servers: This feature also works with a multi-server login (the list will show operators logged into each server).

Tip: Details on shutting down the MONITOR ISM Director software, and 'backing up', restoring, or repairing the database are included in the topics that follow

**Tools** (Menu) ⇨**Who Is Logged In**




- This screen shows a list of all operators who are presently logged onto the central MONITOR ISM Director database (including yourself).

  All 'copies' of the MONITOR ISM Director software and panel communications software must be shut down to run the database repair utility.

# Checking / Repairing the MONITOR ISM Director Database Tables

## The Database Check/Repair Utility

In the event of power failure, or improper shut down, etc., the MONITOR ISM Director database can become damaged, resulting in unusual or cryptic error messages.

The database table repair utility provided with MONITOR ISM Director can check the database for errors, and can usually correct any problems that it finds. As well, this utility compresses the database so it takes up less space.

**Tip:** If a database cannot be repaired, you can also revert to a previous copy (i.e., restore a backup). This is described in a following section.

In a client-server MONITOR ISM Director system, the database/table repair utility is available **only** through the server PC.

Director-Server PC: This is the PC that includes "**...Director-Server.exe**", and typically contains the database as well.

Before checking/repairing the MONITOR ISM Director database, first:

1) Client-server systems: Ensure that **no** copies of the MONITOR ISM Director (or communications) software are logged into the database (**Tools** menu, "Who is logged In"--see previous topic for details).
2) **Shut down** Your MONITOR ISM Director (and communications) software (details follow).

Note: The communications software pertains to PCs that connect with system panels--via cable, modem, or IP-LAN/WAN (≥V3.3).

## Shutting Down the MONITOR ISM Director Software

At the MONITOR ISM Director server, and each client PC (that uses this main database):

- Open the **File** menu;
- Select **Exit**;
- Select **Yes** when asked to confirm.

## Shutting Down Communication Modules

At each PC that connects to system panels or modems:

- Open the task bar (move your mouse to the bottom-right of the screen);
- Check for a telephone/communication symbol on the right-hand side;
- If present, right-click this symbol, and select **Exit** from the pop-up menu.
- Select **Yes** when asked to confirm.

## Checking / Repairing the MONITOR ISM Director Database

Ensure that all copies of the MONITOR ISM Director software (and associated server and communications components) are **shut down**.

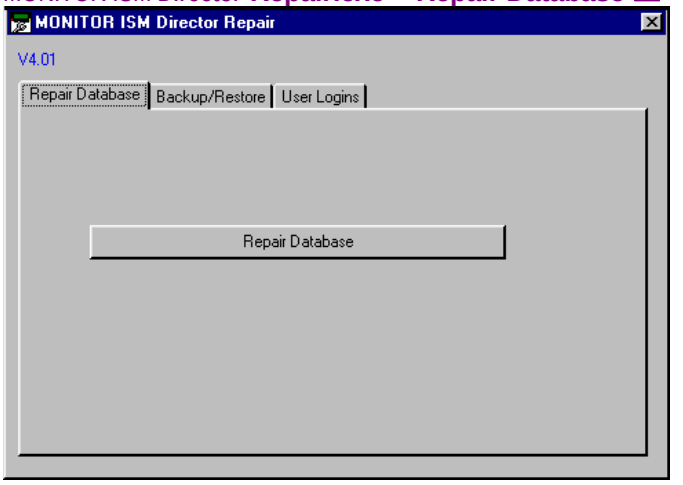
At your MONITOR ISM Director workstation (server PC if client-server) open the Windows **Start** menu, and select **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Repair**.

---

Under **Repair Database** 🗀, click **[Repair Database]**, and wait until the 'success' confirmation screen appears. Then, click **[OK]** to close the confirmation screen, and click the **[x]** in the upper-right corner of the 'Director-Repair' screen to close the database check/repair utility.

**Tip:** For details on copying the database (backup), or reverting to a previous copy (restoring), refer to the next section / below.

MONITOR ISM Director-**Repair.exe ⇨Repair Database** 🗀




## Database Repair

- **[Repair Database]:** Click here to check/repair (and compress) the MONITOR ISM Director database file.

  Client-Server Systems: In a client-server MONITOR ISM Director system, this utility is available **only** at the server PC, and all associated copies of the MONITOR ISM Director software must be *shut down* to repair or restore the database. (To check if anyone else is connected to the database, refer to the preceding topic / above.)

  Director-Server PC: This is the PC that includes "**...Director-Server.exe**", and typically contains the database as well.

- **[x]:** When finished, click this symbol in the top-right corner of the form to exit from the database check/repair utility.

- **Backup/Restore** 🗀 **:** For details on copying the database (backup), or reverting to a previous copy (restoring), refer to the next section / below.

  Note: 'Backups' can be done directly through the MONITOR ISM Director software, or through the database repair utility. Repairing the database, or restoring a previous 'backup' can be done only through the database repair utility. As well, database 'backups' (only) can be done on-the-fly, without shutting down any Director workstations.

---

- **User Logins** 🗀 **:** This feature is documented separately.
  Related Topics: Advanced Database Features

# Backing up or Restoring the Database

## Database 'Backups'

Backing up the database means making a copy to protect against data loss or corruption due to hard drive failure, power loss, etc.

**Tip:** A database 'backup' is also compressed so it takes up less space (≥ v3.30 MONITOR ISM Director).

Database back-ups **must be done on a regular basis** to protect against hard drive failure and/or data corruption. (Copies should be stored on multiple drives/media, and additional copies should be stored off-site, to be available in the event of fire, etc.)

Client/Server Systems: Beginning with MONITOR ISM Director **v3.30**, Database 'backups' can be performed from any MONITOR ISM Director workstation 'on-line'--without being concerned if client PCs are logged in.

Note: This is true for the database **backup** feature only--**not** repairing the database, or restoring a backup using the separate database repair utility.

After Upgrading the MONITOR ISM Director software: Each new version of the MONITOR ISM Director software will typically use an updated database format. As such, a new 'backup' must **also** be done after the software has been upgraded (which includes converting the database for use with the new software).

## Preparation Steps

Before making a 'backup' copy of the database, you should typically:

**1)** Ensure the software database and panels are in-sync. (for details, refer to "Panel Communications and Updates", and/or a preceding section on checking for panel differences).

**2)** Optional: Run the check/repair utility as described in the preceding topic / above.
**Tip:** The backup feature will check the database for errors, and prompt you if you need to repair it first.

**Backing up to a Shared Network Drive:** If you are unable to access a shared network drive, additional set up may be required. For details, refer to "Windows 2000/XP Authorities" (under "PC Issues and Software Installation").

## Making a Database 'Backup' Using the Director Software

Go to the desired workstation, and 'login' to the MONITOR ISM Director software.

To access the database 'backup' feature:

- Select **Database Maintenance** from your MyTools bar, **or**;
- Click **[Management]** in the tree, and select **Database Maintenance**.

On the "Backup" tab, ensure the "**Backup Folder**" and "**Number of Backups to Keep**" values are set as desired.

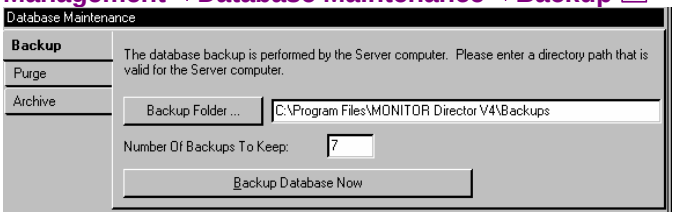
For details, refer to the item-descriptions for this screen. Client-server MONITOR ISM Director systems: See the notice for the "Backup Folder" setting.

Then, click **[Backup Database Now]** on the form. Wait for a 'success' confirmation message, and then click **[OK]**.

**Notice:** Beginning with V3.3, the 'backup' creates two files (.BAK and .XDF). Both of these files are needed to restore the database.

---

**Management ⇨Database Maintenance ⇨Backup** 🗀




- **[Backup Folder]:** The folder/location for database copies to be placed (enter the desired location, **or** click the button, and select the desired one).

  Shared Folders: In addition to folders that you have 'mapped to' as a network drive, you can also access a shared folder thus: "\\PcName\ShareName\MoreFolders" (without the quotes).

  Client-server **Notice**: In a client-server MONITOR ISM Director system, the 'backup' actually occurs at the MONITOR ISM Director server PC. As such, the location entered here must be **as if you were sitting at that PC**. Director Server PC**:** This is the PC that is running "...Director-Server.exe".

- **Number of Backups to Keep:** Once this many 'backups' have been created (over time), new 'backups' will start replacing the oldest ones in the folder. Enter your desired number of files to be retained (**1 - 52)**.

- **[Backup Database Now]:** Click here to make a 'backup' copy of the MONITOR ISM Director database file.

  Note: 'Backups' can also be done through the database repair utility. Database restorals can be done **only** through the database repair utility. (server PC if client-server MONITOR ISM Director system).

  **Tip:** For details on reverting to a previous copy of the database (restoring), refer to a following topic / below.

---

- **User Import** 🗀 **:** This feature is documented separately.

  Related Topics: Advanced Database Features

### Making a Database 'Backup' Using the Table Repair Utility

With software ≥V3.30, you can perform a backup using the Database Repair utility on your MONITOR ISM Director workstation (server PC if client-server).

**Attention:** The "Backup Folder" and "# to Keep" values as set through the Director software will be used. To view or change these settings, refer to the preceding topic / above.

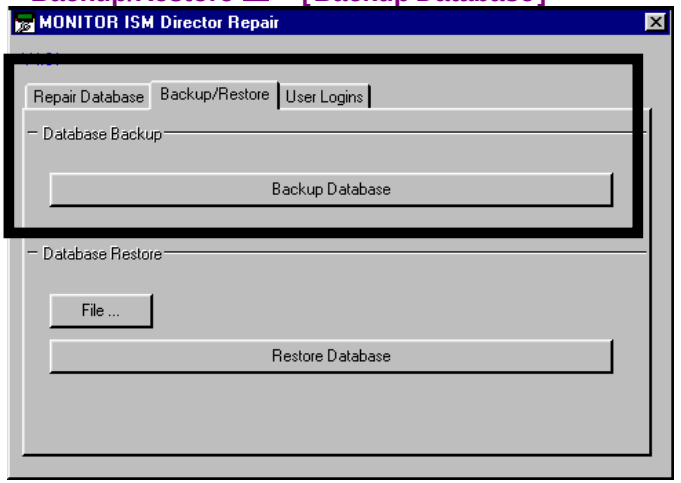
Client/Server Systems: Beginning with MONITOR ISM Director v3.30, Database 'backups' can be performed 'on-line'--without being concerned if client PCs are logged in.

To use this method:

- Open the Windows **Start** menu, and select **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Repair**.
- Under **Backup/Restore** 🗀, click **[Backup Database]**.
- Wait for a 'success' confirmation message, and then click **[OK]**.
- Click the **[x]** in the upper-right corner of the 'Director-Repair' screen to close the database check/repair utility.

**Notice:** Beginning with V3.3, the 'backup' creates two files (.BAK and .XDF). Both of these files are needed to restore the database.

## MONITOR ISM Director-Repair.exe
## ⇨Backup/Restore 🗀 ⇨[Backup Database]




## Database Backup

- **[Backup Database]:** Click here to make a copy of the database (i.e., perform a 'backup').

  Note: The "Backup Folder" and "# to Keep" values as set through the Director software will be used. To view or change these settings, refer to the preceding topic / above.

  **Tip:** Database 'backups' can also be done directly through the MONITOR ISM Director software. As well, database 'backups' (only) can be done on-the-fly, without shutting down any Director software.

- **[x]:** When finished, click this symbol in the top-right corner of the form to exit from the database check/repair utility.

- **[Restore Database]** and **Repair Database 🗀:** Details on checking/repairing the database appear previous/above. For details on reverting to a previous copy of the database (restoring), refer to the next topic / below.

  Note: Repairing the database, or restoring a backup copy can be done only through the database repair utility. Client-server systems: In a client-server MONITOR ISM Director system, this utility is available **only** at the Director-server PC. Director-Server PC: This is the PC that includes "**...Director-Server.exe**", and typically contains the database as well.

---

- **User Logins 🗀 :** This feature is documented separately.

  Related Topics: Advanced Database Features

## Reverting to (Restoring) a Backup Copy of the MONITOR ISM Director Database

If the MONITOR ISM Director database becomes corrupted (such as due to lightning or power failure), or lost (such as due to hard drive failure), you can revert to a copy that was created previously using the 'backup' feature.

In a client-server MONITOR ISM Director system, the database restore feature is available **only** through the server PC.

A database backup can be restored only for the **same version** of the Director software that created the backup (although you can upgrade thereafter if desired).

---

Before restoring the MONITOR ISM Director database, first:

1) Optional: Try running the check/repair utility on your present database as described in a previous topic / above (you may not need to revert to a backup-copy).
2) Client-server systems: Ensure that **no** copies of the MONITOR ISM Director (or communications) software are logged into the database (**Tools** menu, "Who is logged In");
3) **Shut down** Your MONITOR ISM Director (and communications) software.

More: For details on these tasks, refer to the topic on checking & repairing the database (previous / above).

Note: The communications software pertains to PCs that connect with system panels--via cable, modem, or IP-LAN/WAN (≥V3.3).

---

At your MONITOR ISM Director workstation (server PC if client-server) open the Windows **Start** menu, and select **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Repair**.

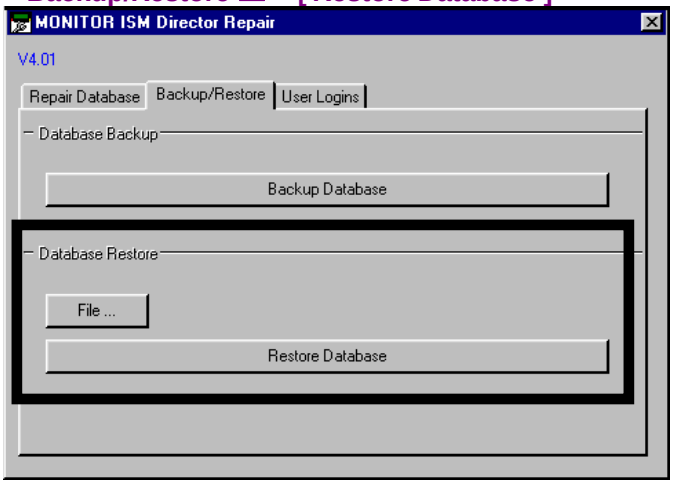
Under **Backup/Restore** 🗀, click **[File]**, and locate and select your desired ".BAK" file (double-click the file, or select it, and click **[Open]** ). Then, click **[Restore Database]**. When the 'success' confirmation screen appears, click **[OK]** to close the confirmation screen, and click the **[x]** in the upper-right corner of the 'Director-Repair' screen to close the database check/repair utility.

## Restoring an Entire PC

In the event of a hard drive failure or other 'catastrophe', you'll need to:

1) Have the computer repaired back into a reliable state.
2) Reinstall MS Windows, and all of your software as necessary--plus the MONITOR ISM Director software (new version if applicable).
3) Perform a database restoral; (Details previous/above).
4) If you upgraded the Director software, you must convert the restored database. QuickRef: MONITOR ISM Director-DB Convert.exe. Related Topic: See step **#6** under "Upgrading from an Earlier Version of Software".

**MONITOR ISM Director-Repair.exe**
**⇨Backup/Restore 🗀 ⇨[ Restore Database ]**




- **[File]:** Click here to locate and select your desired 'backup' file (i.e., a BAK file that was created previously). Tip: Double-click the file, or select the file and click **[Open]**.
- **[Restore Database]:** Click here to revert to your selected database file. (You'll be informed when the restoral is finished.)

  **Reminder:** In a client-server MONITOR ISM Director system, this utility is available **only** at the server PC, and all associated copies of the MONITOR ISM Director software must be *shut down* to repair or restore the database. (To check if anyone else is connected (logged in) to the database, refer to a preceding topic / above.)
- **[x]:** When finished, click this symbol in the top-right corner of the form to exit from the database check/repair utility.
- **[Backup Database]** and **Repair Database 🗀:** For details on these features, refer to the preceding topics/above.

  Note: 'Backups' can be done directly through the MONITOR ISM Director software, or through the database repair utility. Repairing the database, or restoring a previous 'backup' can be done only through the database repair utility.

---

- **User Logins 🗀 :** This feature is documented separately.

  Related Topics: Advanced Database Features

# Exporting or Importing Activity or Audit Logs (Archive)

## What is Archiving?

The archive feature allows moving message logs out of the main database (to improve performance), or re-importing them for use with activity and audit reports.

Read Me: Archiving or purging on a regular basis is highly recommended since the system can become slow and/or unstable if database files become very large.

Note: Archiving pertains to activity messages and/or panel communications and database-update logs (from all defined accounts). V4.1x software also supports / converts v4.0x archives as well.

**Tip:** For message logs that will NOT be needed for future reports, use the **purge** feature instead (to follow).

**Also See:** "Reporting on System & Personnel Activity", and "Reporting on Operator Audits or Panel Communications Logs"

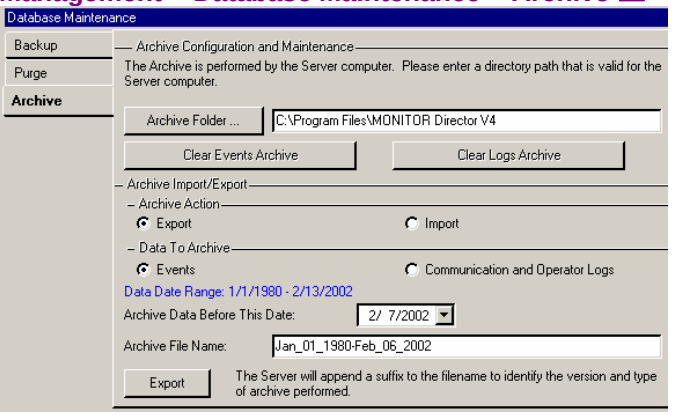
## Archiving Messages (Import or Export)

To access the 'Archive' screen:

- Select **Database Maintenance** from your MyTools bar, **or**;
- Click **[Management]** in the tree, and select **Database Maintenance**.

Then, select **Archive** 🗀, and refer to the item-descriptions for this screen while making your selections.

## Management ⇨Database Maintenance ⇨Archive




- **[Archive Folder]:** This is the location where the archived data will be stored.

  Client-server **Notice**: In a client-server MONITOR ISM Director system, the archiving actually occurs at the MONITOR ISM Director server PC. As such, the location entered here must be **as if you were sitting at that PC**.
  Director-Server PC: This is the PC that includes **"...Director-Server.exe"**.
- **[Clear Events Archive]:** This clears any event messages that had been previously re-imported from an archive (does not affect the external archive data);
- **[Clear Logs Archive]:** This clears any communication/operator logs that had been previously re-imported from an archive (does not affect the external archive data);

### Archive Action

- **Export:** Select this to have messages/logs moved from the database to the external archive file (improves system performance);
- **Import:** Select this to have messages/logs moved from the external archive file back into the database (for inclusion in activity or audit reports);

### Data to Archive

- **Events:** Messages pertaining to activity that occurred in the facility (access granted/denied, sensor tripped, etc.);
- **Communication and Operator Logs:** Logs pertaining to panel communications/update sessions, and database changes made by operators;

### (If you are Exporting Data)

- **Data Date Range:** Date range of all messages/logs in the database (not including any imported archive data);
- **Archive Data Before This Date:** Select the date for the oldest messages/logs that are to be retained in the database. (All older ones will be moved to the external archive file.)

  Pop-up Calendar: Click the [▾] beside the date to access a calendar.
- **Archive File Name:** The filename is set automatically (to indicate the date-range of the data being archived). You can change this if desired.

  **Note:** An archive-type reference will be added to the end of the filename.
- **[Export]:** After re-confirming your selections, click this to export the data.

### (If you are Importing Data)

- **[Archive File Name]:** Select this to browse for the desired archive file. (Locate/select the file, and click **[OK]**.)
- **[Import]:** After re-confirming your selections, click this to re-import all messages/logs from the chosen file.

# Removing old Activity or Audit Logs (Purge)

## What is Purging?

"Purging" refers to deleting old records from the message logs, to free up additional hard-drive space, and allow reports to run faster.

Read Me: Archiving or purging on a regular basis is highly recommended since the system can become slow and/or unstable if database files become very large.

Purging can be done manually, and can also be set to occur automatically.

Note: Purging pertains to activity messages and/or panel communications and database-update logs (from all defined accounts).

**Tip:** To have the data available for running reports in the future, use the **archive** feature instead (previous / above).

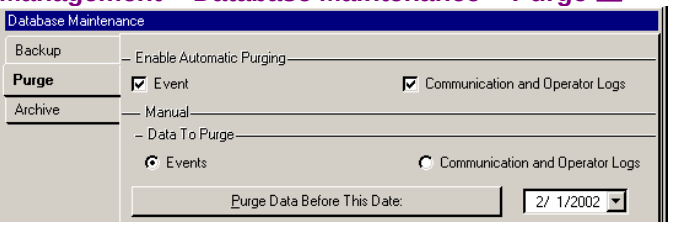
## Purging (Deleting) Messages, or Setting up Automatic Purging

To access the 'Purge' selections:

- Select **Database Maintenance** from your MyTools bar, **or**;
- Click **[Management]** in the tree, and select **Database Maintenance**.

Then, select **Purge** 🗀, and refer to the item-descriptions for this screen while making your selections.

**Management ⇨Database Maintenance ⇨Purge** 🗀




### Enable Automatic Purging

Automatic purging automatically deletes older activity/audit messages. This occurs when the event log reaches 240,000 messages, and removes 10% of the oldest messages (in stages).

- **Event:** Messages pertaining to activity that occurred in the facility (access granted/denied, sensor tripped, etc.);
- **Communication and Operator Logs:** Logs pertaining to panel communications/update sessions, and database changes made by operators;

### Manual Purging / Data to Purge

- **Events:** Messages pertaining to activity that occurred in the facility (access granted/denied, sensor tripped, etc.);
- **Communication and Operator Logs:** Logs pertaining to panel communications/update sessions, and database changes made by operators;
- **[Purge Data Before This Date]:** Click the [▾] beside the date to access a pop-up calendar. Select the date for the oldest messages/logs that are to be retained in the database.

  (All older ones will be permanently deleted.).

  After re-confirming your selections, click **[Purge Data Before This Date]** to delete the older messages/logs.

## Operating System Maintenance

The Microsoft Windows operating system has been in development and general use for many years. Microsoft is finding existing 'issues', and releasing "Service Packs" or other types of updates on an on-going basis to ensure Windows users have a more-or-less trouble-free experience.

It is important to keep your Windows operating system up-to-date in this regard.

| Windows Version | Recommended Updates | Reference |
|---|---|---|
| Windows 95 | n/a (not supported) | |
| Windows NT 4 | n/a (not supported) | http://support.microsoft.com |
| Windows 98 1st Edition | n/a (not supported) | |
| Windows 98 2nd Edition | n/a (not supported) | |
| Windows 2000 | SP3 or higher (check for latest) | |
| Windows ME (Millenium) | n/a (not supported) | |
| Windows XP | SP1 or higher (check for latest) | |

Network Servers: For optimal performance, we recommend running the Director software on **workstation** operating systems only (i.e., NOT on network server operating systems). (This is due to all of the services that will be running on the server PC.)

| Component | Recommended Updates | Reference |
|---|---|---|
| MSDE / SQL Server | SQL Server SP3, and<br>Director SP3 Installation patch | Director Tech Bulletin **028a**<br>"Installing MSDE Service Pack 3" |
| DCOM | DCOM98 v1.3 or higher<br>(for all Windows versions) | Director Tech Bulletin **029**<br>"Data Access Components (DCOM)" |
| MDAC | MDAC 2.7 SP1 or higher | Director Tech Bulletin **029** |
| Jet4 | Jet4 SP3 | Director Tech Bulletin **029** |

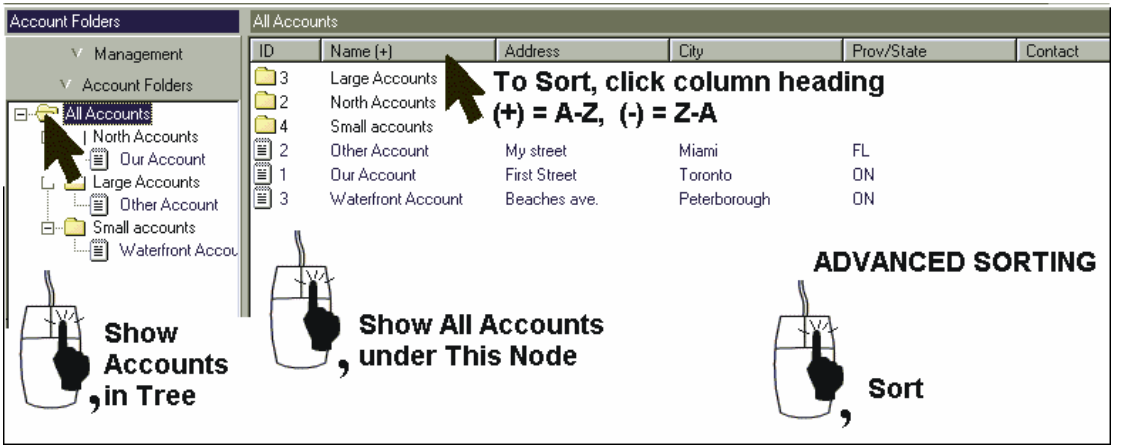
# System Configuration

Beginning with V4.0 MONITOR ISM Director, you can use the **Configuration Wizard** to set up a new system. For more information, refer to "New Installation? Try the Wizard!".

# Working with Accounts and Folders (Multi-Account Systems)

Account Folders, and account-selection issues pertain only for systems with multi-account licensing (or operators with the authority to edit account folders). Beginning with V4.0 MONITOR ISM Director, you can use the Configuration Wizard to set up a new system. For more information, refer to "New Installation? Try the Wizard!".

## Visual Quick-Start




You can view accounts folder-by-folder, or sort a full listing by name, address, etc.

Adjusting the Width of a Column: Drag the boundary between two column headings.

Sorting on Multiple Items: See **"Advanced Sorting"** (to follow/below).

If Multi-Server Login: See **"After a Multi-Server Login"** (to follow/below).

---

### Accounts and Account Folders

An account represents a site, or collection of sites that will share a common set of users, authorities, schedules, etc. In general, this will typically be a single company or customer.

Account folders, on the other hand, provide a method for organizing accounts.

Multi-Server Login: To allow working with (or in) account folders, ensure the desired server is selected under **[Server]** in the 'tree'. (Double-click a server to access its account folders.)

Your desired account must be 'opened' in the tree (double-click) to provide access to account-specific tasks.

**Tip:** Account folders are referenced by "operator permissions"--allowing different types of permissions to be assigned to groups of accounts. Be sure keep this in mind when deciding where to put each account.

Single Account Systems/Licensing: With single-account licensing, the account/folders 'tree' will NOT appear.

For systems that support multiple accounts that presently have only one defined, the "Edit Accounts / Account Folders" authority determines whether or not **[Account Folders]** will appear in the tree. For details, refer to "Operator Permissions".

Panels per Account: Each account can include a total of up to 60 system panels.

### Setting Accounts to Appear in the Tree

Under **[Account Folders]**, account folders appear in the 'tree' (left side of your screen), while accounts are listed in the centre portion of the screen, and can optionally be set to appear in the tree as well.

Multi-Server Alternative: For a multi-server login, servers and accounts will (also) appear under **[server]** in the 'tree'.

To set accounts to appear in the 'tree', click **[Account Folders]** in the 'tree'. Then, right-click within the 'Account Folder' portion of the tree, and ensure that **Show Accounts in Tree** is selected.

**Tip:** This selection is also available in the **View** menu when you are 'in' the Account Folders portion of the tree.

### Opening an Account, or Switching to a Different Account (for Monitoring, Status & Control, User Admin., etc.)

Click **[Account Folders]** in the 'tree'. Then, browse through any account folders, and double-click the desired account (either in the tree, or the centre portion of the screen).

Multi-Server Alternative: For a multi-server login, you can also view and select accounts under **[server]** in the 'tree'.

Your selected account will remain 'open' (e.g., for the event monitoring window) until you select **[Account Folders]** or **[Management]** in the 'tree'.

Single-account license: In this case, account folders are not shown in the 'tree'. (To access your account, simply click your site/account button in the tree.)

### Renaming an Account Folder

Let's suppose you'd like to rename the default account folder as "All Accounts": Click **[Account Folders]** in the 'tree', right-click the desired folder, and select **Rename**. Then, type the new name as desired, and press **Enter**.

### Renaming an Account

Accounts can be renamed either in the 'tree' (if set to display accounts), or in the "Account Information" screen for the account.

Multi-Server Login: You cannot rename an account when under **[Server]** in the 'tree'. (You must first double-click a server or account to exit from that screen.)

Renaming an account using the tree: Click **[Account Folders]** in the 'tree'. Then, locate and right-click the specific account in the tree, and select **Rename**. Now, type the new name as desired, and press **Enter**.

Renaming an account through the Account Information screen : Click **[Account Folders]** in the 'tree'. Then, locate and double-click the specific account using the 'tree' and/or main window.

Exception (Single-account licensing): Click ***[Your Account]*** in the tree.)

When the Account Information screen appears, change the name as desired.

**Tip:** Your settings will be saved automatically when you select a different screen or topic.

### Adding an Account Folder

Let's suppose you want to add an account folder called "Remote Sites" under "All Accounts".

Click **[Account Folders]** in the 'tree', right-click the desired location for the new folder, and select **Add Account Folder**. Then, type the desired name, and press **Enter**.

### Adding a New Account

Let's suppose you want to add a new account "Site ABC" in a folder called "Remote Sites".

Click **[Account Folders]** in the 'tree', right-click the desired folder for the new account, and select **Add Account**. Then, type the desired name, and press **Enter**.

**Tip:** There are numerous items that can be set up for each account. For a suggested procedure, refer to "Setting up a New System (Commissioning)".

### Moving an Account (or Folder) Into a Different Location

Accounts and account folders can be moved as desired using the familiar drag-and-drop approach: Click **[Account Folders]** in the 'tree'. Then, locate the desired account or folder, and use your mouse to drag the item into the desired location.

**Note:** The target folder may not be highlighted. Simply 'drop' the item when the mouse cursor is on top of the desired folder.

### If you need to Delete an Account (or Account Folder)

Before deleting an account, first check to ensure that it is not assigned to any operators: Select **[Management]** in the tree, open the **Operator** branch, and select **Operator**. Then, use the **Grid** / **Form** toolbar-button to switch to 'grid' view, and scroll through the operator list, checking the "Account" and "Monitor Account" columns for the specific one. Be sure to reset any as needed as you go along (click **[...]** ).

**Note:** To allow deleting an account **folder**, you must ensure that it is not assigned within any operator-permissions screens. See: Operator Permissions

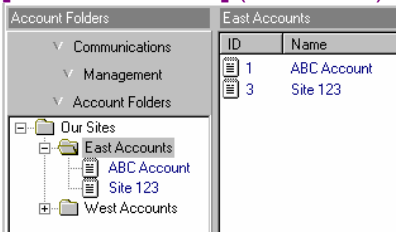
---

Then, click **[Account Folders]** in the 'tree', and locate your desired account (or folder).

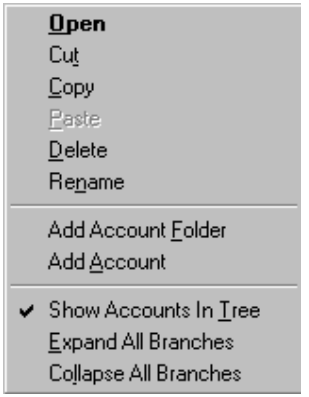
Now, right-click the account or folder and select **Delete**. When asked to confirm, read the warning message. Choose **Yes** only if you are certain you are not deleting an active account.

---

### [Account Folders] (in the 'tree')




### After Right-Clicking within the 'Account Folder' Portion of the Tree (applicable topics)




- **Add Account Folder:** Select this to add a new folder for organizing your accounts.
- **Add Account:** Select this to add a new account.
- **Show Accounts in Tree:** Shows (✓) or hides accounts in the tree window.
- **Expand All Branches:** Shows all account folders in the tree.
- **Collapse All Branches:** Hides / closes all account folders in the tree (except for the highest-level / root folder).

### After Right-Clicking within the Account List (Middle of your Screen)

- **Open:** Opens a selected account or folder (i.e., the item that you right-clicked).
- **Sort:** Allows sorting the account list on more than one item (e.g., by city, then account name, etc.) See "**Advanced Sorting**" (to follow/below).
- **Show all Accounts under this Node:** Shows all accounts within a selected folder—including all sub-folders, as if all of these accounts were in the 'root' of the selected folder.

  Note: The desired folder must be select first.

## After a Multi-Server Login

You can log into up to 6 server PCs at a time. This allows listing and selecting accounts across multiple servers without having to log out in-between. All servers you are presently logged into appear under **[Server]** in the 'tree'.

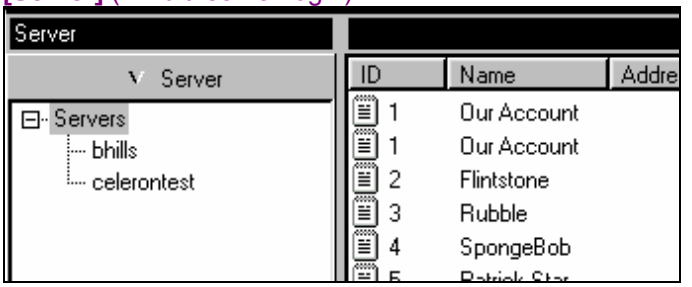
Related Topic(s): Startup and Logging In

After a multi-server login, you will be directed to a **[Server]** node in the 'tree' (or the master account list if the tree is not displayed). You can then:

- Select the "Servers" node in the 'tree' to list all accounts across multiple servers, or;
- Select a server to see the accounts for that server, or;
- Double-click a server to go into the 'Account Folders' for that server.

Working with the Account List: See the "Visual Quick-Start" (previous/above), or look for "**Advanced Sorting**" (to follow/below).

**[Server]** (if multi-server login)




Account Folders: Account folders are not shown in this screen. (Double-click a server to access its account folders.)

Operator Permissions: Each operator will be able to view only the accounts associated with their assigned folders. Related Topic(s): Operator Permissions

Show all Accounts under This Node: This selection applies only to account folders (it is not needed in the **[Server]** portion of the 'tree').

Shared Users: Shared users, etc. pertain to individual servers (i.e., items cannot be shared across servers). Related Topic(s): Users and Holidays Shared Across Multiple Accounts

## Advanced Sorting

In addition to sorting on a single column heading, the account list can be sorted on multiple items as desired (e.g., by City, then account name, etc.).

**Steps:**

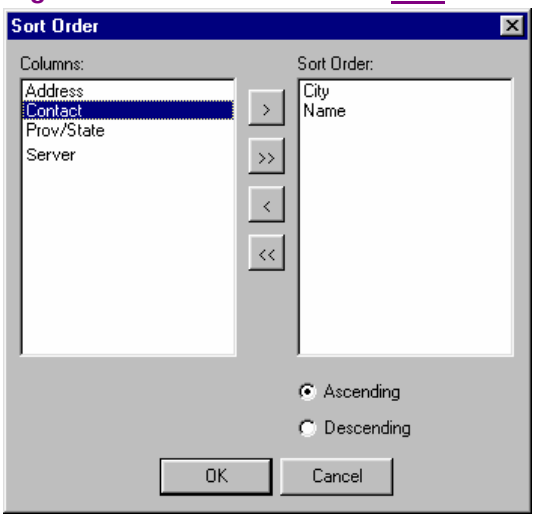
1) Go to the desired 'node' under **[Account Folders]** in the 'tree' (or **[Server]** if logged into multiple servers).
2) Right-click within the account list, and select "**Sort**" from the pop-up menu.
3) Refer to the item-descriptions for this screen while making your selections.

To Sort Through **All** Accounts: Before selecting **Sort**, select the **highest-level** (parent) account folder in the tree. Then, **right**-click the account list, and select "Show All Accounts under This Node".

Multi-Server Exception: After a multi-server login, use the account list under "Server" in the 'tree'. (Select "Servers" in the 'tree', and then sort the list as desired.)

Related Topic(s): Startup and Logging In

**Right-Click the Account List ⇨Sort**




- **[>]:** Adds selected item to the sort-order;
- **[>>]:** Adds all items to the sort-order;
- **[<]:** Removes selected item from the sort-order;
- **[<<]:** Clears the "Sort Order" list (for unsorted accounts, or to set up a new sort order).

---

- **Ascending:** A - Z starting at the top of the screen (+).
- **Descending:** Z - A starting at the top of the screen (-).

Notes:

- Account sorting results are not saved. To sort the account list again, simply click a column heading, or make your selections here again;
- When you sort by clicking on a column heading in the account list, this is also reflected in the **Sort** screen (Sort Order);
- Sorting is reflected in the column headings of the account list: (+) = A-Z, (-) = Z-A, and numbers indicate the sequence of items within the sort-order (e.g., sorted by City **1**, then account name **2**).

# Users and Holidays Shared Across Multiple Accounts

## Introduction

Beginning with Director V4.2, you can set up users and/or holidays to apply to multiple accounts.

Once set up, changes can be made to a shared user or holiday within a specific account, and the changes will be copied to other applicable accounts automatically.

**Tip:** This is also true for changes made to a shared holiday (or a shared user changing their PIN) at an LCD keypad associated with any of the applicable accounts.

Multi-Server Login: Shared users, etc. pertain to individual servers (i.e., you can view accounts across multiple servers, but items cannot be shared across servers). Related Topic(s): Working with Accounts and Folders

### Technical Notes

- With Director V4.20, this feature is limited to panel feature-set **2, 3,** or **4** (1 panel per account, with up to 1000 users each.);
- With panel firmware ≥V4.2, a user can change their own PIN at an LCD keypad, but all other "shared" items and settings can only be edited through the Director software;

**With panel firmware earlier than V4.2:**

- All edits made to shared users through an LCD keypad (including a shared user changing their own PIN) will be ignored/reset by the software.
- Since authority ID#s are reserved in blocks of five, and these must be defined within each account: If one of these is not being used and is deleted through an LCD keypad, the software will maintain integrity by sending a "no areas, no times" version of the authority back to the panel.

### Shared Groups

Shared Groups allow setting up groups of users and/or holidays to apply to multiple accounts, while maintaining data integrity for authorities and other site-specific settings.

### Required Permissions

As with all features, applicable permissions are required to use this feature (for each operator, and any client PCs).

**Notes:** Editing a shared user within an account requires 'edit' permission for 'users' **and** 'shared users'. (The same approach applies to holiday permissions.)

Editing shared items elsewhere requires 'edit' permission for the applicable type of shared item only. (Pertains to: "[Management] ⇨Shared Groups" and/or "Account Folders ⇨Shared Groups ⇨Shared *Item*".)

Assigning groups to accounts requires permission to access the specific account folder(s).

Related Topics:
"Operator Permissions"
"Client Workstation Access and Permissions"

### Overview of Steps (Details follow)

- (This assumes your accounts have already been set up for areas, devices, and schedules.)
  Related Topics:
  + "New Installation? Try the Wizard !", **or**
  + Setting Up a New System (Commissioning)
- **Phase 1: Account-Specific Data**
  (Account Info., Custom User fields, Authorities);
- **Phase 2: Set Up Shared Groups**
  (For: User Settings, Authorities, Users, Holidays);
- **Phase 3: Set up Shared Users and Holidays**
- **Phase 4: Assign Shared Items to Accounts**

### If You wish to Delete a Shared Item

(Phase 2)

If you delete a shared user or holiday (under shared groups in the tree, or within a specific account), the deletion will affect all accounts associated with the shared item.

Shared groups, however, cannot be deleted if presently assigned anywhere.

(To remove an account assignment: See step 4A.)

---

Then, right-click within the 'row' for the specific item, and select **Delete** from the pop-up menu. When asked to confirm, select **Yes**.

Notice: Once shared user groups are assigned to any accounts, you will not be able to change the "User Settings Group" selection for the specific 'Shared User Group' (step 2C).

# Phase 1: Account-Specific Data

## 1A: Settings Needed under "Account Information" for Shared Users and/or Holidays

**Feature Set:**

With Director V4.20, "Shared Users" are supported for panel "Feature Set" values of 2, 3, or 4. To enable the required screens, go into the "Account Information" screen for each account, and change the "Feature Set" value if needed (also see the "Technical Notes").

Related Setting: *AccountName* ⇨Account Information ⇨Standard🗀 See: "Account-Wide Panel Settings".

**"PIN Mode" and "User Logon Mode":**

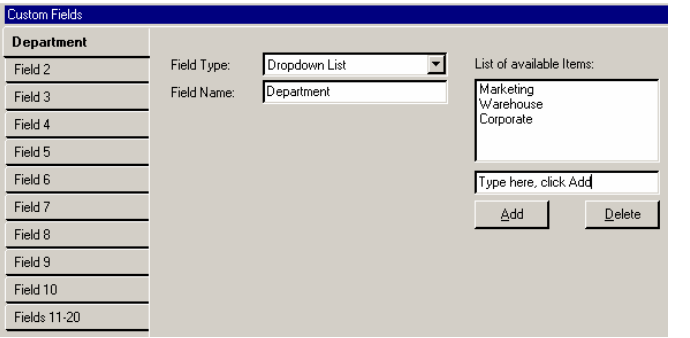
Shared users can only apply to accounts set for the same "**PIN Mode**" and "**User Logon Mode**". Ensure these are set appropriately for each account that is to support shared users.

Related Setting: *AccountName* ⇨Account Information ⇨Setup🗀 See: "Account-Wide Panel Settings".

## 1B: Set up any Custom User Fields for Shared Users

Shared users can have up to 20 custom information categories (user fields) as usual (such as: position, department, vehicle plate, etc.). However, for shared users, these fields can be "single-line edit" only (i.e., values are typed in instead of being selected from a list).

**Account Folders ⇨*AccountName* ⇨Users ⇨Custom Fields**




How this is implemented:

- If the accounts are defined with 'single-line edit' user fields, any user-field values for the shared users will apply to the assigned accounts.

  **Note:** In this case, user-field values will also be updated for all applicable accounts if changed for a shared user in any one of the accounts.

- For any accounts with some other type of custom user fields (e.g., multi-line edit, or drop lists), the custom user-field data is retained and managed separately within each account, and any shared 'custom-user-field' data will be ignored.

### Steps / Detail

Custom-user-fields for shared users are initially configured separately for each account. To implement shared 'custom-user-fields', these fields must be defined with the same usage and order for all applicable accounts, and they must be set as 'single-line edit' fields.

Related Topic: "Custom Information Categories for Users...".

## 1C: Ensure Authorities Have Been Set up for Each Account

In Phase 2, groups of authority ID#s will be reserved for use with shared users (5 at a time). Due to differences in areas, and security requirements, the authorities themselves must be set up at each account as usual (at the same authority ID# for each account). Be sure to keep track of the authority ID# range to ensure the correct ones are reserved in Phase 2.

**Notice:** Authorities must be defined for ALL reserved ID#s (e.g., 1-5, 6-10, etc.).

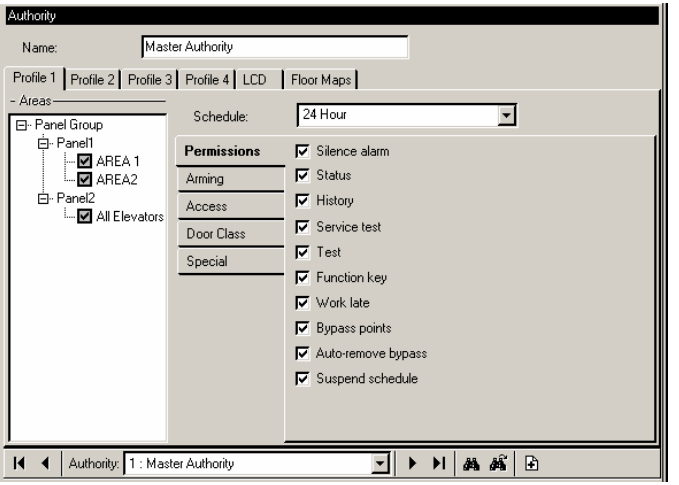
### Viewing or Entering These Settings

For each account:

- Select **[Account Folders]** in the 'tree', and double-click the desired account.
- Select **Authorities** from the MyTools bar, or in the 'tree'.

Then, refer to the "Authorities" administration topic for details on the provided selections.

**Account Folders ⇨*AccountName* ⇨Authorities**



## Phase 2: Shared Groups

### 2A: Set Up Shared User-Setting Groups

With shared users, the 'PIN Mode' and 'User Logon Mode' for each account is set under "[Management] ⇨Shared Groups", and will not be editable under "Account Information". (This is required since the length of each user's PIN and card number is fixed.)

These are defined as "User Settings Groups" which will be assigned in step 2C.

Only the number of PIN mode / User Logon Mode **combinations** needs to be defined.

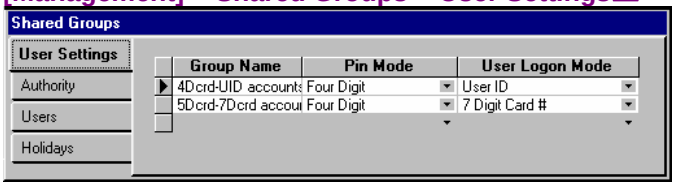
### Viewing or Entering These Settings

Select **Shared Groups** from the MyTools bar, **or** select **[Management]** in the tree, and then **Shared Groups.**

Then, select the **User Settings** tab, and refer to the selection-descriptions for this screen while viewing or entering your desired settings.

**Note:** 'Grid' view does not apply to this feature.

**[Management] ⇨Shared Groups ⇨User Settings**




- **Group Name:** Click here and type a suitable name (such as "4dPIN-5dCard Accounts").
- **PIN Mode:** Click the small button here, and select the PIN length (4 or 5 digits);
- **User Logon Mode:** Click the small button here, and select the logon mode (ID-only, or number of digits in the card numbers);

**Note:** PIN Mode and User Logon Mode pertain to logging in at LCD keypads, or gaining entry at a reader that is set for "ID+PIN mode.

## 2B: Reserve Authority ID#s (Shared Authority Groups)

Ranges of authority ID#s must be reserved for use with shared users. This is done in blocks of five (whether they all will be used or not).

**Notes:** The reserved authorities are then assigned to groups of shared users (step 2C), and these will be the only authorities available to each group of shared users.

For different authority groups to apply to users assigned to the same account, be sure to set up authority groups with non-overlapping authority ID#s.

Since user 'authorities' are tied to 'areas' (and since security requirements may differ between sites), the authorities themselves cannot be shared across multiple accounts. Instead, they are set up as usual for each account as discussed in step 1C.

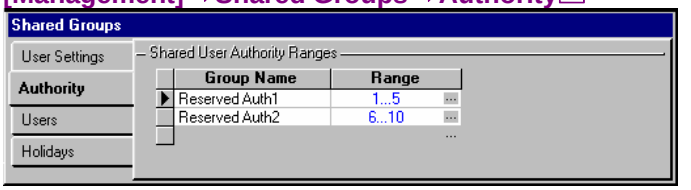
### Viewing or Entering These Settings

Select **Shared Groups** from the MyTools bar, **or** select **[Management]** in the tree, and then **Shared Groups.**

Then, select the **Authority** tab, and refer to the selection-descriptions for these screens while viewing or entering your desired settings.

**Note:** 'Grid' view does not apply to this feature.

**[Management] ⇨Shared Groups ⇨Authority**




### Shared User Authority Ranges

- **Group Name:** Click here and type a suitable name (such as "1st to 5th Authority", "6th to 10th authority", etc.).
- **Range:** Click the small button here, and then use the arrows to select the start and end value for your desired range of authority ID#s (blocks of 5). When finished, click **[OK]**.

### Authority Name

- **Authority:** This shows each reserved ID number from the selected range.
- **Name:** This is a reference description that will appear when assigning authorities to groups of shared users.

  It is useful to set these to indicate the reserved ID# (such as: "1st ID--CEO & Directors", "2nd ID--Division Managers", etc.).

## 2C: Reserve User ID#s (Shared User-Groups)

"Shared User Groups" allow setting up shared users in blocks based on common authorities, plus the 'PIN Mode' and 'User Logon Mode' for the accounts to be associated with these users. This includes reserving ranges of user ID#s for groups of shared users.

**Tip:** This is done in blocks of ten (whether they all will be defined or not).

**Note:** For multiple groups of shared users to apply to the same account, ensure the ID ranges do not overlap.

### Viewing or Entering These Settings

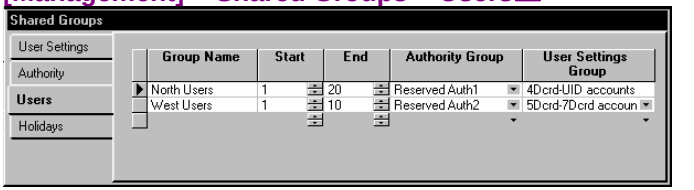
Select **Shared Groups** from the MyTools bar, **or** select **[Management]** in the tree, and then **Shared Groups.**

Then, select the **Users** tab, and refer to the selection-descriptions for these screens while viewing or entering your desired settings.

**Note:** 'Grid' view does not apply to this feature.

---

**[Management] ⇨Shared Groups ⇨Users**



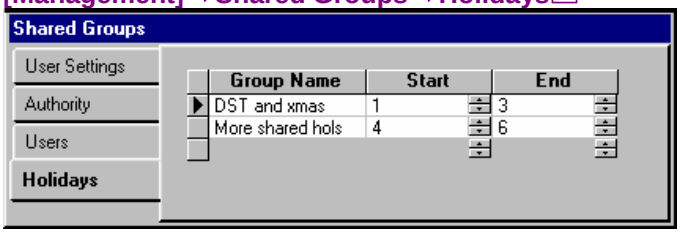

- **Group Name:** Click here and type a suitable name (such as "North Users", "Divisional Managers", etc.).
- **Start** and **End:** Use the arrows to select the start and end value for your desired range of authority ID#s (blocks of 10).
- **Authority Group:** This allows selecting an 'Authority Group' to determine which authority ID#s will be available when setting up the shared users in this group (Ref: Step 3A).
- **User Settings Group:** This allows selecting a 'User Settings Group' to determine the 'PIN Mode' and 'User Logon Mode' to be checked/applied for each account that this group of users is assigned to (Ref: Step 4A).

  Notice: Once shared user groups are assigned to any accounts, this selection can no longer be changed here.

## 2D: Reserve Holiday ID#s (Shared Holiday Groups)

Holidays (and time-change dates) can be shared across multiple accounts if desired. This includes reserving ranges of holiday ID#s for use with each group of shared holidays. This is done in blocks of three or more.

**[Management] ⇨Shared Groups ⇨Holidays**🗀




### Viewing or Entering These Settings

Select **Shared Groups** from the MyTools bar, **or** select **[Management]** in the tree, and then **Shared Groups.**

Then, select the **Holidays** tab, and refer to the selection-descriptions for these screens while viewing or entering your desired settings.

**Note:** 'Grid' view does not apply to this feature.

- **Group Name:** Click here and type a suitable name (such as "DST and xmas", "CommonHols2", "4th to 6th Hol.", etc.).
- **Start** and **End:** Use the arrows to select the start and end value for your desired range of holiday ID#s (blocks of 3 or more).

**Notes:** For multiple groups of shared holidays to apply to the same account, ensure the ID ranges do not overlap.

When setting up each block of shared holidays, only the reserved ID#s will be available.

# Phase 3: Shared Users and Holidays

## 3A: Setting up Shared Users

Once the related "Shared Groups" have been set up (previous/above), you can set up shared users the same as for individual accounts, with the following exceptions:

- Shared users are initially defined under "[ Account Folders ] ⇨**Shared Groups**";
  (NOT under "Users" for a specific account.)
- Shared users are grouped in the tree by their "Shared User Group" (defined previously);
  (e.g., North Users, Division Managers, etc.)
- Shared users will occupy the same user ID# within each account (from the ID# range within each 'Shared User Group').
- Each group of shared users is limited to the reserved authority ID# range as was assigned to each specific group.
  (e.g., 1st - 5th authorities, 6th - 10th, etc.)

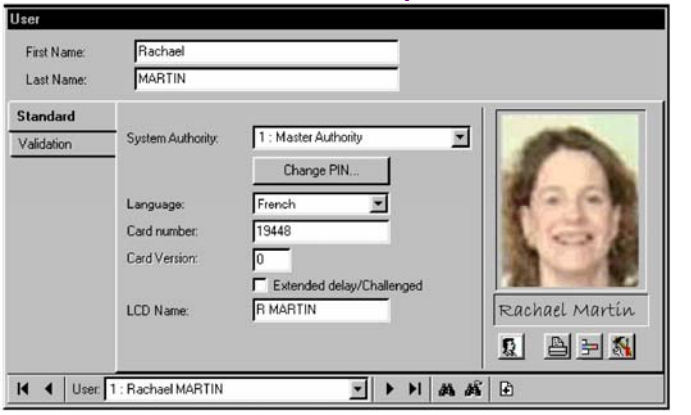
**Notes:** After initial set up, changes made to a shared user under any individual account will be automatically copied to the other applicable accounts (and the "Shared Users" screen).

If desired, you can even assign groups to accounts 1st (step 4A), and then define the users either here, or at the applicable user ID# in any of the applicable accounts.

### Viewing or Entering These Settings

Select **Shared Users** from the MyTools bar, **or** select **[Account Folders]** in the tree, and then 'open' **Shared Groups**, and **Shared User** (click the "**+**" beside each topic).

**Account Folders ⇨Shared Groups ⇨Shared User**




The **Shared User** screen is virtually identical to the **Users** screen. Please refer to the "Users" administration topic for details on the provided selections.

Tip: While referring to the 'Users' topic, you can generally ignore screen location references, as they pertain only when 'in' the Users screen for a specific account.

Note: The shared user screen does not include settings for suite-security keypads. In the unlikely event of a shared user being associated with one, the keypad settings must be made through the **Users** screen for any applicable account(s).

## 3B: Setting up Shared Holidays (and/or Time-Change Dates)

Once the related "Shared Groups" have been set up (previous/above), you can set up shared holidays the same as for individual accounts, with the following exceptions:

- Shared holidays are initially defined under "[ Account Folders ] ⇨**Shared Groups**";
  (NOT under "Holidays" for a specific account.)
- Shared holidays are grouped in the tree by their "Shared Holiday Group" (defined previously);
  (DST and xmas; CommonHols2, etc.)
- Shared holidays pertain to the same holiday ID# within each account (from the ID# range within each 'Shared Holiday Group').
- Each group of shared holidays is limited to the reserved holiday ID# range as was assigned to each specific group.
  (e.g., 1st - 3rd Holiday, 4th - 6th, etc.)

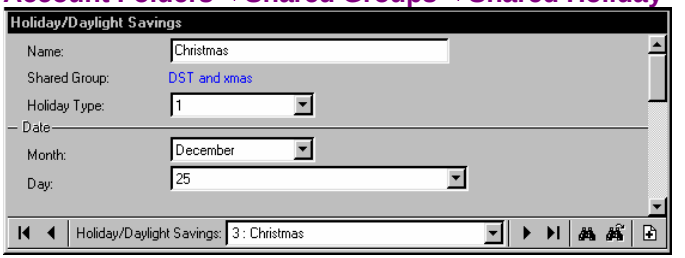
**Notes:** After initial set up, changes made to a shared holiday under any individual account will be automatically copied to other applicable accounts (and the "Shared Holidays" screen).

If desired, you can even assign groups to accounts 1st (step 4B), and then define the holidays either here, or at the applicable holiday ID# in any of the applicable accounts.

### Viewing or Entering These Settings

Select **Shared Holidays** from the MyTools bar, **or** select **[Account Folders]** in the tree, and then 'open' **Shared Groups**, and **Shared Holiday** (click the "**+**" beside each topic).

**Account Folders ⇨Shared Groups ⇨Shared Holiday**




The **Shared Holiday** screen is identical to the **Holiday/Daylight Savings** screen.

Please refer to the "Holiday" administration topic for details on the provided selections.

Tip: While referring to the 'Holiday' topic, you can generally ignore screen location references, as they pertain only when 'in' the Users screen for a specific account.

# Phase 4: Assign Shared Items to Accounts

## 4A: Assign Groups of Shared Users to Accounts (Shared User Management)

Once the related "Shared Groups", "Shared Users", and "Authorities" have been set up (previous/above), groups of shared users can be assigned to applicable accounts.

**Notes:** Only 'Shared User Groups' with non-overlapping ID# ranges can be selected for any specific account.

As groups are assigned to accounts, the shared user(s) are copied to the same/applicable user ID# in each account (from the ID# within each shared group).

### Viewing or Entering These Settings

For each specific account:

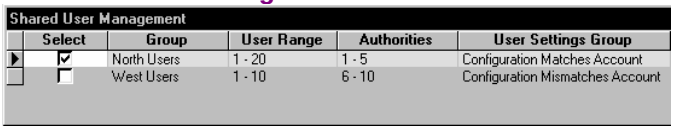
- Select **[Account Folders]** in the 'tree', and double-click the desired account.
- Select **Shared User Management** from the MyTools bar, **or** 'open' **Users** in the tree (click the "+"), and select **Shared User Management** .

Then, refer to the selection-descriptions for this screen while viewing or entering your desired settings.

**Note:** 'Grid' view does not apply to this feature.

---

**Account Folders ⇨*AccountName* ⇨Users ⇨Shared User Management**




- **Select:** This allows assigning a group of users to the specific account. (Click this box for each group to be assigned to the present account.)

  Also see the note for the "User Settings Group" value.

- **Group:** Shows the name of the group of shared users ("North Users", "Divisional Managers", etc.).

- **User Range:** Shows the range of user ID#s associated with this group of shared users;

- **Authority Range:** Shows the range of authority ID#s associated with this group of shared users;

- **User Settings Group:** This shows whether or not there is a 'PIN Length' or 'User Logon Mode' mismatch between the account and the specific group of shared users.

  Note: 'Shared User Groups' can only be assigned to an account that has a user 'PIN Mode' and 'User logon mode' that match that for the assigned 'User Settings Group'. **Ref:** Steps 1A, 2A, and 2C).

  If these do not match, you must:

  + Select (or set up) a different group of shared users (prev. steps), **or**;

  + Change the 'User Settings Group' or assignment (1A, 2A, 2C), **or**;

  + Change these values for the specific account

  Ref: Account Information ⇨Standard🗀.

### 4B: Assign Groups of Shared Holidays to Accounts (Shared Holiday Management)

Once the related "Shared Holiday Groups" and "Shared Holidays" have been set up (previous/above), groups of shared holidays can be assigned to applicable accounts.

**Notes:** Only 'Shared Holiday Groups' with non-overlapping ID# ranges can be selected for any specific account. As groups are assigned to accounts, the shared holiday(s) are copied to the same/applicable holiday ID# in each account (from the ID# within each shared group).

### Viewing or Entering These Settings

For each specific account:

- Select **[Account Folders]** in the 'tree', and double-click the desired account.
- Select **Shared Holiday Management** from the MyTools bar, **or** 'open' **Holiday/Daylight Savings** in the tree (click the "+"), and select **Shared Holiday Management** .

Then, refer to the selection-descriptions for this screen while viewing or entering your desired settings.

**Note:** 'Grid' view does not apply to this feature.

**Account Folders ⇨*AccountName* ⇨Holiday / Daylight Savings ⇨Shared Holiday Management**

- **Select:** This allows assigning a group of holidays to the specific account. (Click this box for each group to be assigned to the present account.)

  Tip: Holiday 1 and 2 pertain to the dates for changing between Standard Time and Daylight-Savings time. As such, a group of shared holidays may include these as well.

- **Group:** Shows the name of the group of shared holidays ("DST and xmas", "CommonHols2", etc.).

- **Holiday Range:** Shows the range of holiday ID#s associated with this group of shared users;

  Note: ID#1 pertains to changing to daylight-savings time, and ID#2 is for changing back to Standard Time. (Rem: 'Spring' ahead for Daylight-Savings, 'fall' back for Standard Time.)

# Account-Wide Panel Settings (Feature-Set, Service PIN, etc.)

**Account Information:** (technical settings)

These screens allow setting the site/account name (to appear in the 'tree'), plus various technical system-wide parameters. These include the "Feature Set", which determines the system capacities for the account. "Account-type" selections determine the items (fields) to appear on-screen.

**Note:** Which 'Feature Sets' are supported (and associated capacities) is based on the software licensing, which is managed through the 'activation key' on the PC that contains the software database (≥**V4:** USB connector; ≤**V3.3.2:** Parallel/printer port; **V3.3.3:** Either).

### Viewing or Entering These Settings

Select **Account Information** from the MyTools bar, **or** click your site/account button in the tree, and select **Account Information**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Now, refer to the selection-descriptions for these screens while viewing or entering your desired settings.

**Tip:** You can use the **Grid** / **Form** toolbar-button to select your preferred screen format (Forms view is recommended here).

## Standard

- **Account Name:** A name/description for the site/account.
  **Tip:** This also appears in the 'tree' area.

### Account Type

**-Intrusion:** Systems with monitored sensors, but no access-controlled doors;

**-Access:** Systems with access-controlled doors, but no monitored sensors or 'Areas';

**-Intrusion and Access:** Systems with both access-controlled doors and monitored sensors.

---

**-Central Station:** Select this if any panel(s) will be monitored through a central monitoring facility;

**-Suite Security:** Systems that include apartments / facilities being monitored by suite-security keypads (2-zone or 8-zone);

**-LCD Keypads:** Systems with any LCD keypad modules;

**-Elevator:** Systems with access-controlled elevators (lifts) and floors.

### Feature Set Information

- **Panel Operating Mode:** This sets the basic operating parameters for the panel (allowing one firmware build to be used world-wide). The choices are: • Standard (typical/North America); • European with modem/dialler available; • UK (ACPO/DD243) with dialler/modem NOT available.

**-Panel Version:** Set this to match the actual panel (firmware) revision level for panels associated with this account (**all** panels for each account must be at the same firmware revision level).

If this is set incorrectly, you will be unable to communicate with the panel(s). Panel firmware information can be found on the system (general) configuration screen after the 1st communication attempt.
System Configuration: See "System Settings for each Panel" (in a following section).
Panel Communications: See "Panel Communications and Updates" (in a previous section).

**Note:** Some features may be supported **only** after upgrading to the latest firmware revision (typically to match the software revision).

- **Feature Set:** (formerly "Memory Model") The memory configuration to use with all panels associated with this site/account. This determines the system capacities for this account (see "Items Listed...", below).

Suites, Elevators: Support for suite-security keypads and/or elevator controllers requires a 'feature set' selection of **5** or higher (via Enterprise software licensing).

Bell 103 Connections: For panels that will connect through their built-in dialler (Bell 103 300 baud modem), the feature-set must be **1-3** (single panel system, up to 300 users). This also requires a USR Sportster 56K modem at the PC (for compatibility with the initialization string).

**-(Items Listed near the Bottom of the form):** The system capacities associated with the selected "Feature Set". For more information,

refer to "System Capacities".

If you cannot select a specific 'feature set', this means that it is not supported by your software licensing. For details, refer to "Software Activation and Licensing".

Panel Memory: With 'feature set' 8-14, panels require additional memory.

## Setup

### Master Panel

- **[Change Master Panel]:** For a multi-**panel** account, this identifies one panel to be referenced for common panel settings (users, etc.) during a "Get From Panel" database update.

For details on transferring settings, refer to "Panel Communications and Updates".

### Global Account Options

- **Display Card Number:** This shows the card number for each user (and/or hides user-ID references) in event messages, reports, and other locations (e.g., fallback users screen);

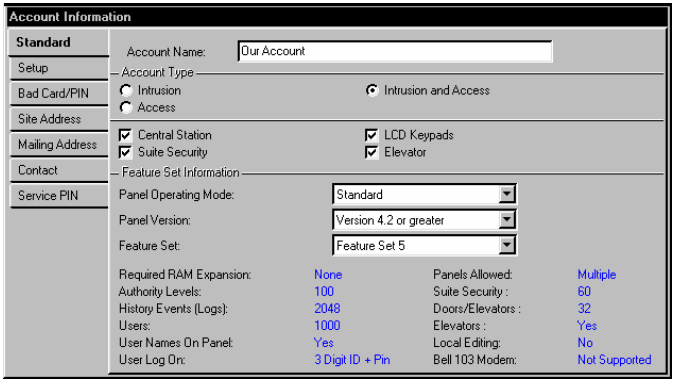
---

- **Allow PIN Duress:** Whether or not users will have the option (at system keypads, and readers set for card / UID **+PIN** entry) to indicate they are being forced to enter by reversing the last two digits of their PIN. This will be logged as a duress alarm.
- **PIN Mode:** Whether user-PINs (for use at reader keypads, and system (LCD/LED) keypads will be four or five digits long;

  Notice -- **"Shared Users"**: With users assigned across multiple accounts ("Shared Users"; ≥V4.2 Director), the PIN Mode and User Logon Mode will be locked here. Related Settings:

  - [Management], ⇨Shared Groups, ⇨**User Settings**🗀.
    (See the previous topic on "Shared Groups").
- **User Logon Mode:** This determines whether users must enter their ID number or card number when logging onto LCD keypads, and/or gaining entry at doors (e.g., ID + PIN mode). User-number selections include the number of digits--which should be set to support the largest card number used at the site.
- **Escort Required Mode:** The type of cards/users who will be able to escort "Visitor (Escort-Required)" users throughout the facility.

### Account Information




Escort User: Valid users/cards with "Escort Privilege" authority;
Permanent User: Valid users/cards that do not have an expiry date;
Any User: Any valid users/cards--either permanent or temporary.
**Note:** In each case, escorts CANNOT be set as "Visitor (Escort-Required)" themselves.

Related Settings:

- Users, ⇨Validation🗀, ⇨**Invalid On**.
  See: Users (Entrants/Panel Users).
- Authorities, ⇨Profile 1-4🗀, ⇨Access🗀, ⇨**Escort Privilege**, and **Visitor (Escort Required)**
  See: Authorities for Users / Entrants.

### Card Action

- **Ignore Pending Enrolment:** This sets card-enrolment readers to work on expired/disabled cards whether set for "pending enrolment" or not. If not selected, card-enrolment readers will affect only cards set as "pending enrolment".

  Application Tip: Cards can be set as 'Pending Enrolment' manually (e.g., when first issued), or when accepted at a reader set to do this. 'Expired' cards also includes cards that had been previously enabled for a set period of time by a reader set to do this.

  Related Settings:

  - Users, ⇨Validation🗀, ⇨Pending Enrolment.
    See: Users (Entrants/Panel Users).
  - Configuration, ⇨Doors, ⇨In Reader (or out...)🗀, ⇨[Card Action].
    See: Reader 1 & 2 Settings for a Door.

## Bad Card/PIN (≥ V4.20)

These selections pertain to how the system will respond to repetitive invalid cards and/or invalid PINs at a reader or LCD keypad (i.e., an unauthorized person trying to gain entry).

Related: • Control & Status ⇨Panel Control & Status ⇨System ⇨**[Clear User Lockout]**

### Invalid User Detection

- **Maximum Bad PINs:** The number of invalid PINs that can be entered before that person will be locked out.
- **User Lockout Duration:** The duration that users will be locked out in response to repetitive invalid access attempts. (This pertains to individual users, as well as 'global lockouts'.)

  Tip: Long duration and/or permanent 'lockouts' can be removed through: • Control & Status; • Visual Director; • A 'Command Point' custom input.
- **Maximum Lockouts Before Global Lockout:** The number of individual users that can be locked out for an account before triggering a 'Global Lockout' condition. This: • Will generate a local alarm message; • Can be transmitted to a monitoring facility (setting to follow); • Can be set to block access to all users on an area by area basis.

  Related: Configuration ⇨Areas ⇨Access ⇨"Bad Card Action"

  Tip: A global lockout can be removed through:
  • Control & Status;
  • Visual Director, and/or: • A 'Command Point' custom input.
- **Reset Timeout:** The minimum duration between invalid cards/PINs for which the counter will not be incremented.
  (The counters reset to 0 if not incremented during this time.)
- **Invalid Card Detection:** Allows turning invalid card detection on or off, and setting the type of invalid cards to be counted.

  Invalid Cards: Cards denied access due to:
  • Not in database; • Wrong site number;
  • Wrong version number;

  High Risk: Cards denied access due to: • Card expired; • Schedule expired; • Interlock violation;
  • Reader locked out; • Wrong area.
- **Maximum Invalid Cards:** The number of times an invalid card can be presented before that card will be locked out (for the 'User Lockout Duration');
- **Transmit Global Lockout Alarm:** For a centrally-monitored facility, this determines if 'global lockouts' are to be transmitted to the monitoring station.

## Site Address and Mailing Address

- **Name:** The name/description for the site/account (as set through the "Standard" tab).
- **Address:** The address/location of the site/account.
- **[Copy Site Address to Mailing Address]:** This sets the "Mailing Address" to match the present "Site Address".

## Contact

- **Phone:** The voice/contact phone number for the person who looks after the system.
- **Contact:** The on-site contact person for the site/account.
- **Comments:** Additional information pertaining to this site / account (optional).

## Service PIN

- **[Change Service PIN]:** Allows changing the PIN required for a service person (user 00) to access the panels in this account.

After changing the Service PIN, ensure the panel is updated right away. For details, refer to "Panel Communications and Updates".

Configuring a panel through an LCD keypad is supported only in single-panel accounts set to "Feature Set" 1-4 (see previous). **Exception**: Programming of modules that require keypad programming (HSC/printer module, RF module, & Smart-PODs, plus associated I/O set-up) is supported in all systems.

# Event Responses for Acknowledging Alarms

### Event responses

Sample event responses can be set up ahead of time to make things easier for operators when they are acknowledging alarms.

For details on acknowledging alarms and using the responses that have been defined here: Ref: Click the Coloured Box for an Alarm Message 🕮 Dealing with Alarms (Comment / Resolve)

### Setting Up Sample Event Responses

Select **Event Response** from the MyTools bar, **or** click your site/account button in the tree, open **Account Information** (click the "+"), and select **Event Response**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one item at a time;
Grid View: All defined items in a list.

Choose one of the following tasks, and then refer to the selection-descriptions for this screen as needed.

---

**Entering a New Event Response:** Click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

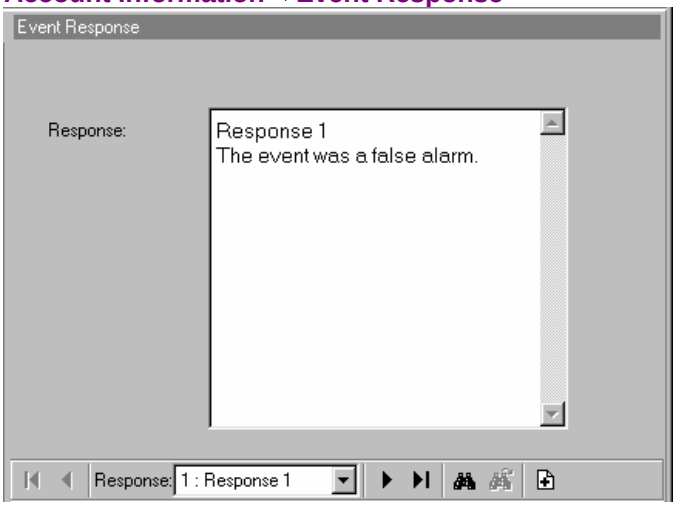
Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window).

**Viewing/Changing an Existing One:** In 'Forms' view, select an 'event response' from the pop-up list at the bottom of the window.

**Searching for an Event Response:** Click the 'binoculars' symbol. Then, enter the name (or the first few characters + "*" ), and click **[Find]**.

**Deleting an Event Response:** Right-click a blank area on the form (grid view: right-click the item in the list), and select "**Delete**". When prompted to confirm, select Yes.

### Account Information ⇨Event Response




## Pick-List (bottom of the Form)

- **Response:** This is where you select a sample event response to view or edit. This area shows a reference number assigned by the system, and the first few words of the text, once defined.

## On This Form

- **Response:** The text to be available to operators when they are acknowledging an alarm.

  Tip: When acknowledging an alarm, the sample responses defined here will be identified in a list based on the first few words of the first line. As such, it is best to set this portion of the text to uniquely identify each response.

# Alarm / Event Instructions

## Introducing Event Instructions

Event instructions are text instructions that can be set to appear in the comment/resolution window when an operator is acknowledging an alarm (pertaining to specific types of messages, or those from a specific sensor / input-point).

**Also See:** To assign instructions to alarm messages (or specific input points), refer to "Customizing How Events are Displayed (Event Priority)" and/or "Input Points—Monitored Sensors"

## Setting Up Event Instructions

Select **Event Instruction** from the MyTools bar, **or** click your site/account button in the tree, open **Account Information** (click the "**+**"), and select **Event Instruction**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one instruction at a time;
Grid View: All defined instructions in a list.

Choose one of the following tasks, and then refer to the selection-descriptions for this screen as needed.

---

**Entering a New Instruction:** Click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window).

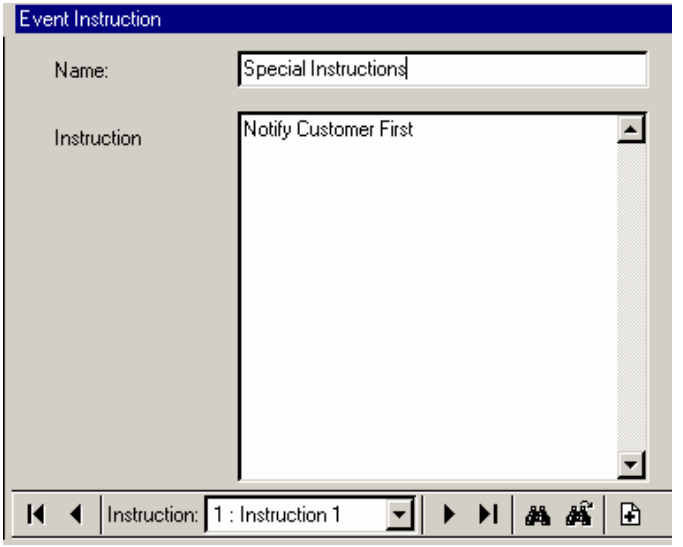
**Viewing/Changing an Existing One:** In 'Forms' view, select an 'instruction' from the pop-up list at the bottom of the window.

**Searching for an Instruction:** Click the 'binoculars' symbol. Then, enter the name (or the first few characters + "*" ), and click **[Find]**.

**If you Need to Delete an Instruction:**

1) Look under "**Event Priority**" to ensure it is not assigned to an event (and change assignments as needed).
2) Return to "**Event Instruction**", and open/select the desired one.
3) Right-click a blank area on the form (grid view: right-click the item in the list), and select "**Delete**".

## Account Information ⇨Event Instruction




## Pick-List (bottom of the Form)

- **Instruction:** This is where you select an event instruction to view or edit. This area shows a reference number assigned by the system, and the name of the instruction, once defined;

## On This Form

- **Name:** A suitable name for the event instruction (e.g., "Fire Instructions");
- **Instruction:** The text to appear in the comment/resolution screen for alarms associated with this instruction;

# Enabling Sounds (to be associated with event/alarm messages)

## Sounds to be Associated with Specific Events and Alarms

Sounds can be associated with specific alarms and events. Before a custom sound can be associated with an event, it must be activated here.

Note: By default, your PC's "exclamation" sound will be associated with alarms that require resolution. This is set through the Windows control-panel.

**File Format:** MONITOR ISM Director supports standard Windows sound (WAV) files. Up to 20 different sounds can be used (system-wide / for all accounts).

**Also See:** To assign sounds to alarm messages, refer to "Customizing How Events are Displayed (Event Priority)".

## Enabling Sounds

Select **Sound** from the MyTools bar, **or** click [Management] in the tree and select **Sound**.

Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one sound at a time;
Grid View: All enabled sounds in a list.

Choose one of the following tasks, and then refer to the selection-descriptions for this screen as needed.

---

**Activating a New Sound:** Click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window).

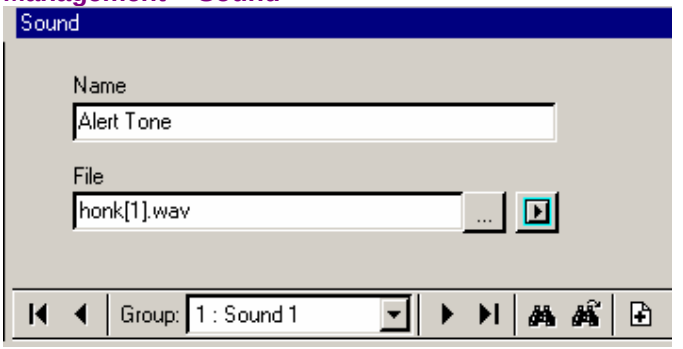
**Viewing/Changing an Existing One:** In 'Forms' view, select a sound from the pop-up list at the bottom of the window.

**Searching for a Sound:** Use the 'binoculars' at the bottom, or switch to grid view and scan the list.

**If you Need to Remove a Sound:**

1) Look under "Account Information->**Event Priority**" to ensure it is not assigned to an event (and change assignments as needed).
2) Return to "Management->**Sound**", and open/select the desired one.
3) Right-click a blank area on the form (grid view: right-click the item in the list), and select "**Delete**".

**Management ⇨Sound**




## Pick-List (bottom of the Form)

- **Sound:** This is where you select a sound to rename, or associate with a different WAV file. This area shows a reference number assigned by the system, and the name of the sound, once defined;

## On This Form

- **Name:** A suitable name for the sound (e.g., "Fire Alert");
- **File:** This is the location (path) and filename of the sound file (.WAV). **Tip:** Click **[...]** to browse for the file, Then, select the file and click **[Open]**.
- **[▶]:** Select this to listen to a sample of your selected sound.

# Customizing How Events are Displayed (Event Priority)

## Introducing Event Priorities

You can customize how specific events and alarms will be displayed, and assign custom colours, and sounds. These selections can be system-wide, or for events occurring in a specific area.

## Customizing Events

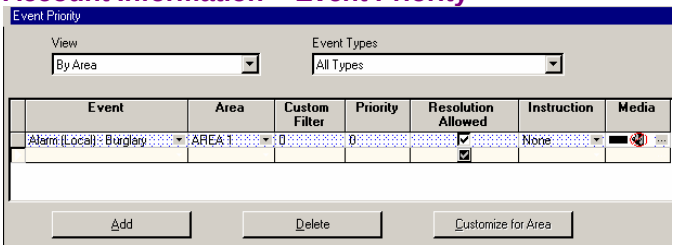
Select **Event Priority** from the MyTools bar, **or** click your site/account button in the tree, open **Account Information** (click the "**+**"), and select **Event Priority**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Now, refer to the selection-descriptions for this screen while viewing or entering your desired settings.

**Tip:** This feature uses a special view style (the Grid / Form button will be disabled).

## Account Information ⇨Event Priority




## Top of the Form

- **View:** The type of events you are viewing (global and/or custom events associated with specific areas;
- **Event Types:** This allows limiting your event priority screen to specific event/alarm topics only;

## Buttons at the Bottom of the Form

- **[Add]:** When viewing custom events (i.e., "By Area"), this creates a blank 'row' to allow setting up a new custom event;
- **[Delete]:** This allows deleting a custom event (when viewing "By Area");
- **[Customize for Area]:** When viewing "System Wide" events, this allows quickly creating a custom (area-specific) version of a selected event;

## Columns (Event Criteria)

- **Area:** This is the area associated with the specific event (either "All Areas", or a specific area);
- **Custom Filter:** This field can be used by specific operators to limit the messages they will see in the monitoring window (i.e., only messages set to specific 'custom filter' values);
- **Priority:** This affects the sort order in the monitoring window, and can also be used by operators to limit the messages they will see in the monitoring window;
- **Resolution Allowed:** This determines whether or not the comment/resolution screen will be available for each specific event (when working in the event/monitoring window);
- **Instruction:** This allows assigning instruction text to appear in the comment/resolution screen when an operator is acknowledging a specific alarm;

  **Note:** To be available here, instructions must be defined first:
  Ref: Account Information ⇨**Event Instruction**
  📖 Alarm / Event Instructions

  Instructions Associated with Specific Sensors: An instruction can also be associated with specific sensors (input points)--which will take precedence over any instruction selected here.
  Ref: Configuration ⇨**Input Points**
  📖 Input Points—Monitored Sensors
- **Media:** This allows assigning a colour and a sound to each event/alarm message. Click **[...]** to assign a sound and/or colour to an event. (In the next screen, you can click **[▶]** to hear your selected sound.)

  **Notes:** To be available here, custom sounds (WAV files) must be activated 1st:
  Ref: [Management] ⇨**Sound**
  📖 Enabling Sounds (to be associated with event/alarm messages).

  By default, your PC's "exclamation" sound will be associated with alarms that require resolution. This is set through the Windows control-panel.

# Panels, Panel Groups, and Connection Settings

## Panel Groups and Connection Settings

### Panel Groups

- Pertain to individual panels, or groups of panels sharing a connection (up to 30 panels per group/connection). **Tip:** Each connection pertains to a physical cable, or a dial-up modem and phone number.

  **IP Exception:** With IP connections (≥ **V3.3** software), a "Panel Group" can include **any** 1-30 panels within an account communicating through the same PC and port (IP device). In this case, panel groups will typically be set up based on geographic location, or network characteristics. The Director software can communicate with any number of panels within the group during a single communications session. More on IP: Refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

- Identify the 'communication pool' to be used to manage communications to and from the panel(s).

**See Also (Related Topics):**

+ Panel Connection Overview.

**Reference Notes:**

Panels per Account: Each account can include a total of up to 60 system panels.

A panel group must be set up for each direct-connection and (remote) modem, even where only one panel is using the connection. **Tip:** A panel group is set up automatically for your first (or only) system panel.

Multi-**panel** support depends on your software licensing. For details, refer to "Software Activation and Licensing".

Dial-up panels with their own dedicated external modem (or IP interface--if ≥ **v3.3** software) can be set to automatically dial-in to the MONITOR ISM system and transmit either alarms, or blocks of 256 events. This would require setting up each panel with its own 'Panel Group' (one panel per group). Otherwise, the MONITOR ISM Director system is updated whenever a connection is initiated with the panel(s).

To set a dial-up panel to automatically transfer alarms or blocks of activity messages, refer to "Monitoring, Paging, & Remote Mgt. Settings".

The transmission of messages to a central monitoring station is not related to panel groups, or the connections used to communicate with the MONITOR ISM Director system.

Monitoring Station Connection: Central monitoring is supported through:

- The panel's built-in dialler ('Bell 103', 300 baud modem), and/or;
- An "IP" connection (LAN/WAN--if ≥ **v3.3** panel & software), or;
- A high-security Mark 7 / DVACS connection (Canada).

### Adding a Panel Group

Click your site/account button in the tree.
(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Open **Configuration** in the 'tree', and ensure "Logical Tree View" is not in effect.
If "System" is the 1st item under "Configuration", right-click **Configuration**, and **de**-select **Logical Tree View**.

Now, right-click **Configuration**, and select **Add Panel Group**. Then, select your "New Panel Group" in the tree.

Use the **Grid** / **Form** toolbar-button to select your preferred screen format (Forms view is recommended here).

Then, refer to the selection-descriptions for this screen while entering and/or selecting the name/location, and other settings as desired.

### Viewing or Changing Settings for a Panel Group (Location and Connection Type)

Click your site/account button in the tree.
(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Open **Configuration** in the 'tree', and ensure "Logical Tree View" is not in effect.
If "System" is the 1st item under "Configuration", right-click **Configuration**, and **de**-select **Logical Tree View**.

Select your desired panel group (under Configuration), and then use the **Grid** / **Form** toolbar-button to select your preferred screen format (Forms view is recommended here).

Now, refer to the selection-descriptions for this screen while viewing or changing your settings as desired.

### If you need to Delete a Panel Group

Before deleting panel group, ensure that it does NOT contain any panels and related devices that you wish to retain. A deleted panel (and associated devices) can be recovered only if a current database 'backup' is available.

**Tip:** You can use the right-click menu to copy and paste panels and related settings from one panel group to another.

Click your site/account button in the tree.
(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

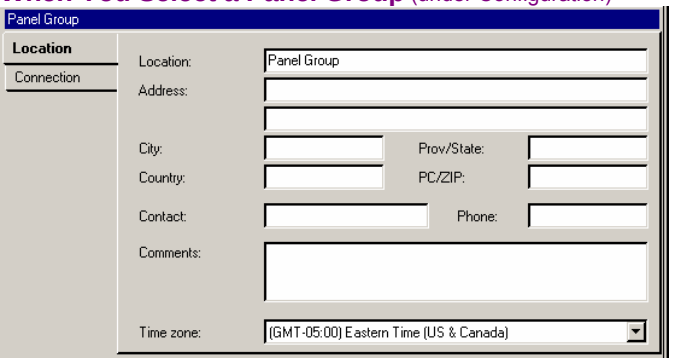
Open **Configuration** in the 'tree', and ensure "Logical Tree View" is not in effect.
If "System" is the 1st item under "Configuration", right-click **Configuration**, and **de**-select **Logical Tree View**.

Select your desired panel group (under Configuration), and check that it does not contain any panels and related devices that you wish to keep.

Then, right-click the panel-group and select **Delete**. When asked to confirm, read the warning message. Choose **Yes** only if you are certain you are not deleting any desired panels and related devices.

Sample screens and selection-descriptions appear on the following pages.

## When You Select a Panel Group (under Configuration)




## Location

Settings pertaining to the location of the panel(s), plus the local time zone for the specific location. **Tip:** The **Time Zone** setting causes any panel clock updates to be adjusted accordingly.

## Connection

These settings pertain to panel communications sessions that are initiated by the software.

Quick Tip: "Logical tree View" must **not** be in effect.

- **Communication Pool:** The serial cable or modem(s) that can be used when communicating with specific panel(s) from the PC. For details on setting up communication pools, refer to "Communication Pools for System Panels".
- **PC Connection Type:** The type of PC-to-panel connection:
  - + Direct Cable Connection: A direct connection (RS-232 or RS-485);
  - + Regular Modem: A 56K modem installed at the PC and panel(s);
  - + Bell 103: A 56K modem installed at the PC, connecting through the built-in dialler (300 baud modem) at the panel (see 'Bell 103' below);
  - + IP: An IP (LAN/WAN) connection (≥ **V3.3** Director software);
    (More on IP): Refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

**(Bell 103):** Due to speed considerations, the "Bell 103" setting (300 baud) is supported only in smaller systems ("Feature Set" 1, 2, or 3: Single-panel account, with up to 300 users). To set the feature-set, refer to "Account-Wide Panel Settings".

- **Speed** (for a direct-cable connection)**:** This is the speed at which the system will attempt to communicate with the panel(s).
- **Telephone Number** (for a modem connection)**:** This is the phone number to dial when initiating a communications session with the specific panel(s).
  This phone number can include numeric digits only, plus commas--to insert brief pauses if necessary.

# System Panels and Displayed Item-Numbers

## System Panels

System panels, the core of each installation, provide data storage, communication, and other functions for all associated expansion modules and related peripherals (doors, sensors, etc.). An installation may pertain to a single panel, or multiple panels in various locations.

**Reference Notes:**

Panels per Account: Each account can include a total of up to 60 system panels.

Multi-**panel** support depends on your software licensing. For details, refer to "Software Activation and Licensing".

There are numerous items that are set up for each panel (in addition to the settings in this section). For details, refer to the "Configuration" chapter in the table of contents (at the front of this guide). The system identifies each panel based on its serial number. This is set in the "System Communication" screen. For details, refer to Monitoring, Paging, & Remote Mgt. Settings

## Adding a New Panel

Click your site/account button in the tree.
(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Open **Configuration** in the 'tree', and ensure "Logical Tree View" is not in effect.
If "System" is the 1st item under "Configuration", right-click **Configuration**, and **de**-select **Logical Tree View**.

Under **Configuration**, locate and right-click the panel-group for the new panel, and select **Add Panel**.

Use the **Grid** / **Form** toolbar-button to select your preferred screen format (Forms view is recommended here).

Then, refer to the selection-descriptions for this screen while entering the name/location, and other settings as desired.

## Viewing or Changing the Location or 'Offsets' for a Panel

Click your site/account button in the tree.
(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Open **Configuration** in the 'tree', and ensure "Logical Tree View" is not in effect.
If "System" is the 1st item under "Configuration", right-click **Configuration**, and **de**-select **Logical Tree View**.

Then: (**Tip:** Open = Click the "+".)

| |
|---|
| Open: **+** Configuration |
| ...and **+** Specific Panel Group |
| ...and select: **+ Your Desired Panel**. |

...to access the panel set-up screen.

Use the **Grid** / **Form** toolbar-button to select your preferred screen format (Forms view is recommended here).

Then, refer to the selection-descriptions for this screen while viewing or changing your settings as desired.

## If a System Panel is Replaced

If a defective or damaged panel is replaced, be sure to identify the new panel **"Serial Number"** to the software.
For details, refer to "Monitoring, Paging, & Remote Mgt. Settings".

---

Then, issue a "Send to Panel" communications session to transfer all settings to the new panel.
For details, refer to "Panel Communications and Updates".

## If you need to Delete a System Panel

Before deleting a panel, ensure that it does NOT contain any related devices that you wish to retain. A deleted panel (and associated devices) can be recovered only if a current database 'backup' is available.

**Tip:** You can use the right-click menu to copy and paste devices and related settings from one panel group to another.

Click your site/account button in the tree.

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Open **Configuration** in the 'tree', and ensure "Logical Tree View" is not in effect.

If "System" is the 1st item under "Configuration", right-click **Configuration**, and **de**-select **Logical Tree View**.

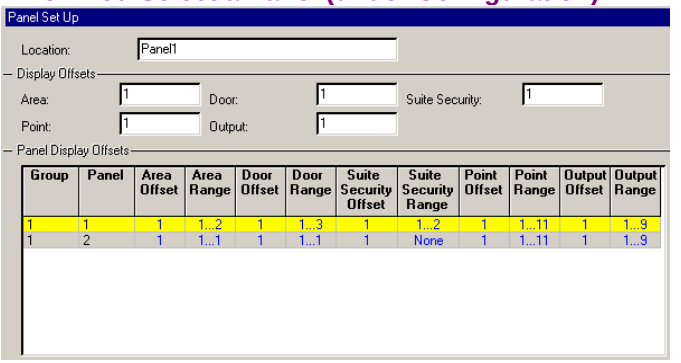
Then, open: (Tip: Open = Click the "+".)

**+** Configuration
**+** Specific Panel Group
**+** Your Desired Panel

...and verify that this is the panel you wish to delete. **Tip:** Device settings can be copied to other panels if desired (right-click, copy; right-click, paste).

Then, right-click the panel, and select **Delete**. When asked to confirm, choose **Yes** only if you are certain about deleting the panel.

## When You Select a Panel (under Configuration)




Quick Tip: "Logical tree View" must **not** be in effect.

- **Location:** A suitable name or location for the specific system main panel;
- **Display Offsets** (Repeating vs. Unique Item-Numbers)**:** With the default setting of "1", the areas, doors, etc. for each panel will be numbered the same (e.g., 1st Panel, Area 1, 2, 3,… 2nd Panel, Area 1, 2, 3,… etc.). This allows for accounts that span multiple buildings. Setting the 'offsets' allows item-numbers to be unique / sequential (e.g., Area 1, 2, 3, ...17, 18, etc.)—which is useful for multiple panels in the same building.

  Elevators: Door and elevator numbering is shared (1 - 32). As such, the 'Door' offset applies to elevators as well. Floors: Floors are identified by name only. As such, 'offsets' do not apply.

  **Setting Item-Numbers to Be Sequential:** For each item (area, door, etc.), check the item-range from the preceding panel, and then set the 'offset' for the panel to the lowest available* number.

  ***To allow for Future Expansion:** You can set the 'offsets' as if each panel had **all** items defined (areas, doors, etc.). **Tip:** Be sure to add "1", to obtain the next available number. Refer to the system capacities for the number of items supported per panel.

- **Panel Display Offsets:** This shows the 'Display Offsets' for all panels pertaining to an account, plus the resulting item-range for each panel based on the present "Display Offsets".

# System Settings for each Panel

## System Security Settings for a Panel

### The System Screen

The System screen provides access to various security settings pertaining to a specific panel.

### Viewing or Changing these Settings

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

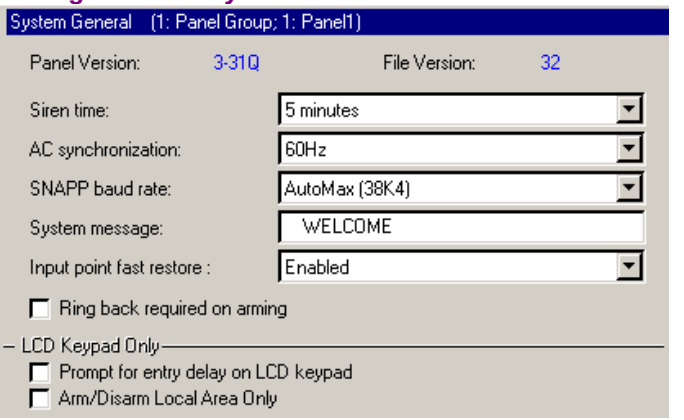
Select **System** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **System**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

Use the **Grid** / **Form** toolbar-button to select your preferred screen format (Forms view is recommended here).

Then, refer to the selection-descriptions for this screen while viewing or changing your settings as desired.

## Configuration ⇨System




## Pick-List (bottom of the form)

-**Panel:** If the tree is **not** set to show items on a panel-by-panel basis, you will be able to select a panel here (for systems that have more than one).

A "Panel Group" reference may also be shown here, **or** you can set the 'tree' to list configuration topics separately for each panel. For more information, refer to "Other Desktop Choices".

## On This Form

- **Panel** (firmware) and **File Versions:** Revision information for the panel (which is read-in during each communication attempt);

  To allow panel communications, the panel version must be set correctly through the "Account Information" screen.
  Account Information: See the section entitled "Account-Wide Panel Settings" (previous).
  Panel Communications: See the section entitled "Panel Communications and Updates" (previous).

  **Note:** Some features may be supported **only** after upgrading to the latest firmware revision (typically to match the software revision).

- **Siren Time:** This is the duration for any siren activations for the entire system/panel.

  The Siren Feature: This pertains to monitored sensors (input points), system/equipment conditions, and/or panic/emergency keys that have been set to trigger a siren condition—as signalled by a programmable output set to activate on a system or area "siren" condition. **Also see:**

  - Equipment Settings (Pseudo / Internal Inputs)
  - Input Points—Monitored Sensors
    Emergency keys: Pertains to 1st 3 inputs on an LCD keypad.
  - Input Points—Pre-Defined Sensor Types
  - Input Points—Custom Point Types
  - Programmable Outputs (Signalling & Device-Switching)

- **AC Synchronization:** Frequency of AC source to sync with for panel time display accuracy. **Note:** With an unstable AC service, select "No Sync--AC Power Detection" (AC failure will be reported if the frequency drops below 12.5 Hz);

- **SNAPP Baud Rate:** This is the speed this main panel communicates with the modules connected to it.

  The higher speed (38400) is recommended in all systems (especially with door and/or elevator controllers), and **required** with suite-security keypads. **Note:** Trouble-free communications requires proper (shielded) cabling, and adherence to wiring guidelines covered in your system-commissioning guide.

- **System Message:** A greeting of up to 16 characters to appear at LCD displays (alternates with the time, and alarm conditions).

- **Input Point Fast Restore:** Whether or not a point restoral (return to normal) is to be sent within 1 minute (versus only at siren time-out);

- **Ring Back Required on Arming:** Whether or not the monitoring station will cause a keypad tone and short siren squawk to confirm each time an area is armed--as required for UL-listed systems.

### LCD Keypad Only

- **Prompt for Entry Delay on LCD Keypad:** Whether or not the user will be asked if they want the optional entry delay each time any area is set to STAY. (An entry delay provides time for an authorized entrant to disarm the area.)

- **Arm/Disarm Local Area Only:** This limits a system LCD keypad to allow arming and disarming of only the area associated with the keypad. (Otherwise, users can arm any area as per their assigned authority).

### The System Communication screen

This screen provides access to miscellaneous security settings that pertain to a specific panel.

**Tip:** Beginning with MONITOR ISM Director V4.0, you can use **Wizards** to set up a new system, and initiate communications with panels. (Look in the **Tools** menu).

### Viewing or Changing these Settings

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **System Communication** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and "System" (**+**), and select **Communication**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

Use the **Grid** / **Form** toolbar-button to select your preferred screen format (Forms view is recommended here).

Then, refer to the selection-descriptions for this screen while viewing or changing your settings as desired.

### Setting a Panel to Automatically Dial-In and Transmit Messages to MONITOR ISM Director

Panels with their own dedicated external modem (or IP interface--if ≥ v3.3 Director) can be set to automatically dial-in and transmit messages to the MONITOR ISM Director system.

(In other configurations, the messages are transmitted when a connection is made with the specific panel/account—either manually by an operator, or through a scheduled/repeating communications session that was set up previously.)

First, check that the "Panel Groups" for each applicable panel contain no other panels (one panel per 'Panel Group').

For details, refer to "Panel Groups and Connection Settings".

---

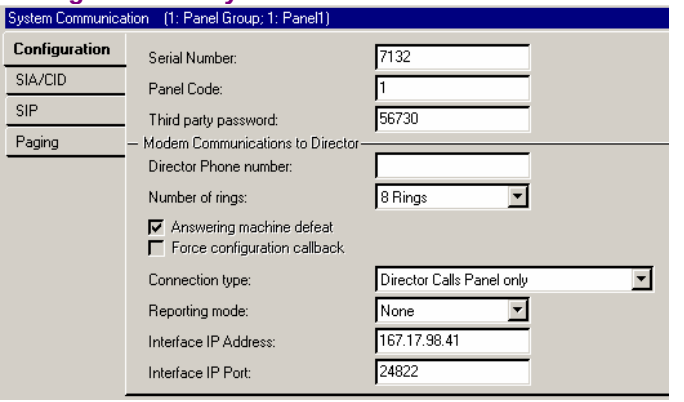
Then, access "Configuration⇨System⇨Communication" for the specific panel as described previously.

Now, refer to the descriptions for first tab while setting:

- The "Connection Type" to support two-way communications, and;
- The "Reporting Mode" as desired.

IP Connectivity (≥ **v3.3**): Setting up an IP connection is documented separately. For details, refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

## Configuration ⇨System ⇨Communication




## Pick-List (bottom of the form)

-**Panel:** If the tree is **not** set to show items on a panel-by-panel basis, you will be able to select a panel here (for systems that have more than one).

A "Panel Group" reference may also be shown here, **or** you can set the 'tree' to list configuration topics separately for each panel. For more information, refer to "Other Desktop Choices".

## Configuration

(PC/Panel ID, Host Reporting)

**Note:** Some of the following settings will be hidden depending on the "PC Connection Type" selected for the 'panel group' associated with this panel. For details, refer to "Panels, Panel Groups, and Related Settings".

- **Serial Number** (also known as "Host Address"): Enter the serial number of the specific panel (this allows the software to identify each panel).

  **Tip:** The serial number is typically hand-written (5 digits) on a small sticker on the circuit board.

- **Panel Code** (also known as Account UID): This is a reference number to identify the panel, site, or account.

  For a new panel, this can be any non-zero number, and can be the same for all panels per site or per account if desired. For settings to be **uploaded** from an existing panel (i.e., a "Get from Panel" communications session), the panel itself must have a non-zero "Panel Code" set up by an authorized service person, and that number must also be entered here.

  **Note:** In the unlikely event of two panels having the same serial number, the "Panel Code" numbers would have to be unique.

  Paging Feature: The Panel Code number is used with the numeric paging feature (see "Paging", to follow/below). For the paging feature to be used in a multi-**panel** account, Panel Code numbers must be unique, **or** sequential / offset output-numbers must be set up.

  To set up sequential output numbers for a multi-panel account, refer to the "Display Offsets" values under "System Panels and Displayed Item-Numbers".

- **Third Party Password:** This is a security 'key' used by the software to block an unauthorized connection to the panel (e.g., another PC running the MONITOR ISM Director software).

  For a new panel, this can be set as desired. To upload data from an existing panel, this setting must match the one stored at the panel.

---

- **Interface IP Address** and **Interface IP Port** (IP connections only): These settings pertain to an IP (LAN/WAN) connection to a panel. This feature is supported beginning with **V3.30** of the Director software.

  IP connections are documented separately. More: Refer to the installation guide provided with the IP board (may also be in PDF format on your Director CD).

---

- **Director Phone Number** (modem connections only): The phone number to be used whenever this panel initiates a connection with the computer—to transmit alarms, and for a 'Forced Configuration Callback' (details to follow);

- **Number of Rings** (built-in Bell 103 modem): The number of rings before this panel answers the phone when a connection attempt is initiated from a remote PC.

  An external modem is set up using physical switches and/or terminal communications software. For details, refer to the installation topic: "Windows Modem Setup".

- **Answering Machine Defeat** (built-in Bell 103 modem): When calling to update the panel, if the remote PC rings 1-2 times, hangs-up, and then calls again, the panel will pick up immediately on the 2nd call (within 1 minute);

- **Force Configuration Callback** (built-in Bell 103 modem)**:** When a connection attempt is issued from a remote PC, the panel will hang-up and redial to connect with the computer at the expected location (phone #).

  **Note:** A Bell 103 connection is supported only in smaller systems ('Feature Set' 1, 2, or 3, one panel per account, up to 300 users). To set the 'Feature Set', refer to "Account-Wide Panel Settings".

---

- **Connection Type:** This sets whether or not panel-initiated communications will be available (where supported by the physical type of connection).

  Director Calls Panel Only: This is available with all connection types, and fixed/pre-set with the following connections:
  **+** A direct-cable-connection, or;
  **+** Using the panel's built-in dialler (Bell 103, 300 baud modem), or
  **+** Any type of multi-panel (shared) connection.
  (Alarms / events will be transmitted to the MONITOR ISM system each time a connection is initiated to update/sync panels.)

  Panel and Director can call each Other: This is supported when each panel has its own dedicated (external) modem--via 8 wire serial connection (or IP-interface--if ≥ **V3.3** Director software). Alarms and events will be transmitted as per the "Reporting Mode" (to follow), plus each time a connection is initiated to update/sync panel settings.

  **Tip:** The basic connection type is set for the "Panel Group" associated with this panel. For details, look for the "PC Connection Type" setting under "Panels, Panel Groups, and Related Settings".

- **Reporting Mode:** With two-way communications (see prev. item), you can set how the panel will transmit messages to the MONITOR ISM Director software (None, blocks of 256 events, or individual alarms as they occur).

  Tip: Reporting to a central monitoring facility is set through 🗀 SIA/CID or 🗀 SIP (to follow / below).

## 🗀 SIA/CID 🗀 (Central Monitoring Facility)

- **Digital Account ID:** This is a number used by the receiver at the monitoring station to identify this panel (0-9999).
  **Note:** If the 'Format' is set as 'SIA', this value can be 0-999999. (See "Format", to follow.)

- **Mode:** The operation of a Bell-103 connection to a central monitoring facility (built-in 300 baud modem/dialler):
  + **No Reporting:** Bell 103 reporting disabled;
  + **Digital On:** Bell 103 enabled;
  + **Digital as Backup:** Bell 103 only as backup if HSC (or IP) failure.

(IP Connection--if ≥ **V3.3** panel and software): IP connections (SIP reporting) are documented separately. For details, refer to the manual included with the IP board (may also be in PDF format on your Director CD).

(HSC): An HSC connection requires a high-security communications module, and Mark-7 / DVACS service (Canada). HSC modules require some set-up locally through an LCD keypad (for details, refer to your system commissioning reference guide).

- **Format:** The format of messages transmitted to the monitoring station (SIA, or Contact ID).

For details on which messages are to be reported for each area, refer to the "Reporting" selection near the end of "Areas and Related Settings".

- **Phone Number:** This is the typical number that this panel will use to transmit messages to the monitoring station.

- **Backup Phone Number:** This is an alternative line that the panel will use if it is unable to get through on the primary phone number.

Pertaining to phone numbers, these characters can be included: T=Tone; P=Pulse (default); D=Pause 2 sec.; A=Star key, #=Pound key, W=Wait for second dial-tone (**A** & **#** only via **T**one).

- **Call Sequence:** This is the dialling sequence for the primary and backup numbers ('ULC', 'UL', 'Long', or 'Fx Standard').
  (In Canada, select ULC or FX Standard.)

  If you need more information, look for "**S001:00**" in the Commissioning Guide for your system.

## Communication Test

- **Frequency (and Time/Day Settings):** The length of time between (and time of occurrence for) automated trials on the reporting channels (HSC and/or dialler--as per the "Report Mode" above).

  This allows 'staggering' the communications test times for multiple panels. With "Automatic", the time will be random from 1:00 - 4:00 AM.
  UL Listed Systems: This must occur at least daily.

## SIP (Central Monitoring via IP)

- **SIP Mode** and **SIP Address:** These settings pertain to reporting to a central monitoring facility through an IP (LAN/WAN) connection. This feature is supported beginning with **V3.30** Director software, **and** requires ≥ **V3.30** panel firmware. Note: The "SIP Address" (if used) is obtained from your central station rep.

  Setting up Central Monitoring via IP (SIP Reporting): This is documented separately. For details, refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

  A Bell 103 (300 baud) connection can be used as backup if desired (see "Mode" under SIA/CID 🗀; previous/above). With SIP reporting, an HSC/printer module can be used **only** for printer functions.

  SIP Reporting and Auto-Dial-Out to MONITOR ISM Director: With SIP reporting to a central monitoring facility, the "Reporting Mode" (see previous/above) is supported only through an "IP" connection. With a modem connection to a Director PC, alarms / events will be transmitted each time a connection is initiated through this software.

## Paging (Signal a Numeric Pager)

- **Enable Paging:** This enables or disables the paging feature.
- **Pager Phone Number:** This is the phone number of the (numeric) pager to be notified when any of the paging outputs are triggered.
- **Output Trigger Mode:** This sets the programmable outputs to be monitored for paging (outputs 5-8, or 5-8 and 121-128).
- **Format:** This selects the (numeric) paging format:

  **1 (N.A. w/handshake):** North American with hand-shaking (typical/common setting).

  **2 (N.A. blind):** North American without handshaking.

  **3** and **4:** Future use.

The specific events to trigger the pager are defined under "Configuration⇨Output Points" (i.e., the settings for outputs 5-8, or 5-8 and 121-128). For details, refer to "Programmable Outputs".

The message to be sent to the pager will be the "Panel Code" (or "Account UID"), and an output-reference number (1= 005, 2=006, ...12=128).

It is very useful to print out a small alarm/output reference (wallet or pager-size), for each system that has paging set-up.

# System Card-Access Settings

## The System Access Screen

Facilities that include Door Control modules provide integrated access-control (who can go where and when) as a seamless adjunct to security and monitoring features. The System Access screen contains card-format settings, and other card-access settings for a panel.

Two card types can be set up, allowing either Wiegand / Prox and Magstripe/barcode, or two types of Wiegand / Prox cards to be used with each specific panel.

## Viewing or Changing these Settings

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **System Access** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and "System" (**+**), and select **Access**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

Use the **Grid** / **Form** toolbar-button to select your preferred screen format (Forms view is recommended here).

Then, refer to the selection-descriptions for this screen while viewing or changing your settings as desired.

## Disabling Odd or Even Parity-Checking

If odd or even parity-checking is not desired, or the position and start values are not known:

- Ensure 'position' and 'start' are set to any non-zero value (1-40);
- Set the length to 0 (zero).

---

**Settings Needed for C2000 Units (UK)**

- Token Type: Wiegand;
- Card ID--Position and Length: Ignored;
- Card ID--Bits per Card: 32;
- Odd parity--Position/Start/Length: 32/14/18;
- Even parity--Position/Start/Length: 1/2/18.

---

## Pick-List (bottom of the form)

**-Panel** (optional)**:** If the tree is **not** set to show items on a panel-by-panel basis, you will be able to select a panel here (for systems that have more than one).

A "Panel Group" reference may also be shown here, **or** you can set the 'tree' to list configuration topics separately for each panel. For more information, refer to "Other Desktop Choices".

## 🗀 Standard 🗀 and 🗀 Alternate 🗀

(for 1st & 2nd card formats to be used at the same time)

Two card types can be set up, allowing either Wiegand / Prox and Magstripe/barcode, or two types of Wiegand / Prox cards to be used with each specific panel.

All length values refer to number of **characters** for magnetic stripe cards (MS), or number of **bits** for Wiegand technology (W).

- **Token Format:** This allows defining parameters for the basic card/token types (as selected for each specific reader).

  "Wiegand" pertains to cards/tokens for readers with Wiegand data-format (Wiegand, Proximity, etc.). Similarly, "Magstripe" pertains to cards for readers with magstripe output (magstripe, bar-code, etc.).

---

- **[Wiegand 26]:** This automatically sets the card-format values for the standard 26-bit Type-A Wiegand format.
- **[Wiegand 36]:** This automatically sets the card-format values for the proprietary 36-bit Wiegand format.

### Card Site (Site/System Code)

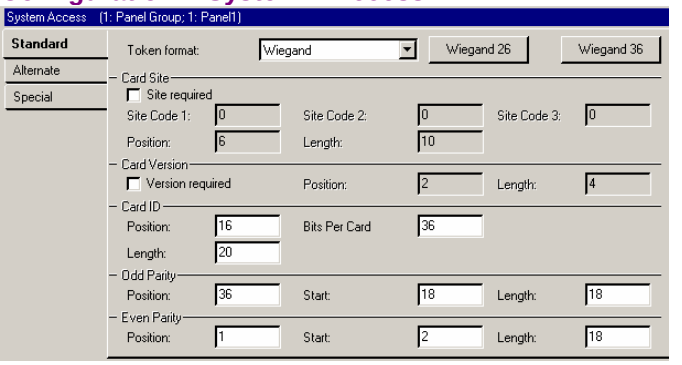
- **Site Required:** This enables/disables site code checking. If selected, cards without one of the specified site codes will be denied access.
- **Site Code 1, 2, 3:** If site-code checking is enabled, only cards encoded with one of these site codes will be allowed access at this site (e.g., **0004, 1234, 9999**).
- **Position:** The start position of the site code (1-40);
- **Length:** The length of the site code (MS: 1-4; W: 1-20).

## Card Version (Version-Number)

This feature requires ≥**V3.2** panel firmware and ≥**V1.5** door/elevator controller module firmware. For an additional setting, refer to "AutoUpdate Card Version", under 🗀 **Special** 🗀 (to follow).

- **Version Required:** This enables/disables version number checking (allows fixed-ID cards to be re-issued if lost or stolen).
- **Position:** The starting position of the version number (1-40).
- **Length:** The length of the version number (MS: 1-2; W: 1-20).

## Configuration ⇨System ⇨Access




## Card ID

- **Position:** The starting position of card ID number (1-40);
- **Length:** The length of card ID number (MS: 4-9; W: 1-32).

  32-Bit Cards: Supported with panel firmware ≥**V3.2**, and door/elevator controller module firmware ≥**V1.5** (prev. 20 bit / 6 digits).
  **V3.2** panels: MaxID=999999999; **≥V3.31** Panels: MaxID=4 294 967 295.
- **Bits per Card:** The length of the card data in bits (Wiegand), or characters (magnetic stripe). This can be up to 40.
- **Bits per Character** (magstripe only)**:** The number of bits used to identify each character of data on a magstripe card (future use; fixed as **4**).

## Odd Parity

These settings pertain to odd-parity checking, which helps to identify card 'misreads'.

- **Position:** The position of the odd-parity 'checksum' (1-40);
- **Start:** The starting position of the data being checked for odd-parity (1-40);
- **Length:** The number of digits being checked for odd-parity (1-40).

## Even Parity

These settings pertain to even-parity checking, which helps to identify card 'misreads'.

- **Position:** The position of the even-parity 'checksum' (1-40);
- **Start:** The starting position of the data being checked for even-parity (1-40);
- **Length:** The number of digits being checked for even-parity (1-40).

## 🗀 Special 🗀 (Miscellaneous Items)

- **Door Fallback Mode:** Cards to be granted access if the door controller module is unable to communicate with the main MONITOR ISM panel database:
  - **None:** No cards/tokens accepted;
  - **Valid Token Format:** All readable cards/tokens accepted;
  - **Valid Site Code:** All cards/tokens with the correct site code will be granted access;
  - **10 Fall-back Users:** Only the users who are assigned as 'FallBack Users'. For details, refer to "Fall-Back Users...".
- **Unlock All Doors On Fire Alarm:** If selected, all doors in all areas associated with this panel will automatically unlock when a fire alarm is detected by this panel.
- **AutoUpdate Card Version:** For fixed-ID cards with a version number, this sets how re-issued cards are to be handled.

  ☑ = Grant access to a card with higher version number, and update the version number for the specific user automatically;

  ☐ = Only cards that match the version number for each user will be granted access (must update manually when a card is re-issued).

  To set the initial/actual version number for specific card(s), refer to the section on "Users".

For additional related settings, refer to "Card Version" (previous). Panel Version: This feature requires ≥**V3.2** panel firmware.

# Equipment Settings (Pseudo / Internal Inputs)

## Equipment Settings for a Panel

The Equipment screen includes monitoring / signalling settings pertaining to various events associated with a specific panel (and/or expansion modules). These can also be thought of as 'pseudo' or 'internal' input points.

## Accessing the "Equipment" Configuration Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **System Equipment** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and "System" (**+**), and select **Equipment**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Viewing or Changing These Settings

Access "Configuration⇨System⇨Equipment" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one equipment topic at a time;
Grid View: All monitored conditions in a list.

In 'Forms' view, select the desired item at the bottom of the window. You can also use the 'browse' buttons to scan through the defined items.

(In Grid View, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

For a list of the specific events, refer to the **Equipment** screen in the MONITOR ISM Director software.

## Blocking Certain Events from Being Monitored by the System

Equipment settings cannot be deleted, but they can be set as ‘disabled’ if you want the system to ignore them.

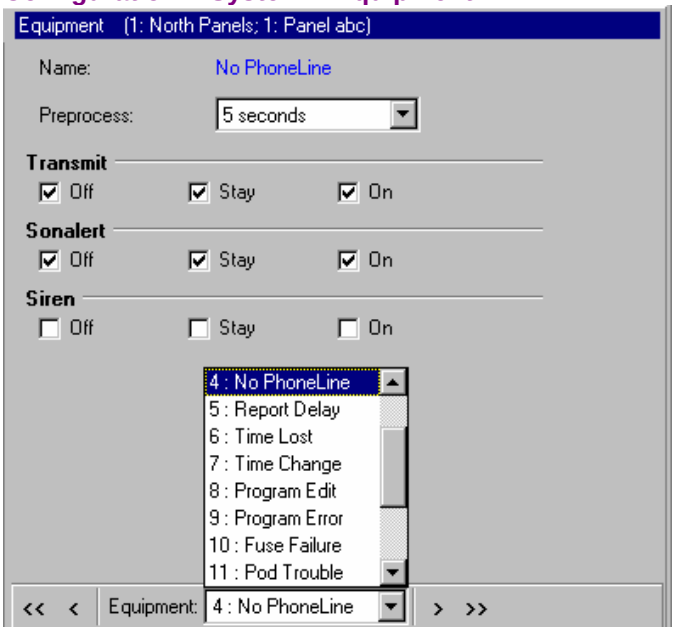
To do this, first access "Configuration ⇨ System ⇨ Equipment" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired item at the bottom of the window. You can also use the 'browse' buttons to scan through the defined items.

(In Grid View, scan the list as desired.)

Now, set ‘Preprocess’ to “Disabled” (the first selection at the top of the list). When finished, repeat this process for any other ‘Equipment’ selections that you want the system to ignore.

## Configuration ⇨System ⇨Equipment




## Pick-Lists (bottom of the form)

**-Panel Group** & **Panel** references (optional)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".

- **Equipment:** This is where you select an internally monitored item to view or edit. This area shows a reference number assigned by the system, plus a description of the item;

## On This Form

- **Name:** The event / alarm condition being configured (these names are set by the system, and cannot be changed).
- **Preprocess:** The duration that the condition must remain in effect before an alarm will be audited.

### Transmit

- **Off / Stay / On:** The (applicable area's) arming levels for which a message of the event will be transmitted to the monitoring station;

### Sonalert

- **Off / Stay / On:** The (applicable area's) arming levels for which keypad sonalerts will be sounded for 1 second when the alarm occurs;

### Siren

- **Off / Stay / On:** The (applicable area's) arming levels for which siren outputs will be sounded when the alarm occurs. (The "Siren Time" is set through the **System** screen.) For details, refer to "System Security Settings for a Panel".

# Understanding Access-Controlled Areas

### Access-Controlled Areas

Personnel access can be fully customized to meet a wide array of applications—based on settings for individual doors, and broader 'areas', in conjunction with the authorities assigned to blocks of users.

An overview of some of the common features is provided here.

### Control of Personnel Entry (Access-Control)

In its simplest sense, access-control can be thought of as "Who can go where and When". Now, add "What must they do to gain entry", and "What happens when they enter", and you're beginning to understand the choices available to you.

Blocks of users are given access to specific areas based on settings in their assigned "Authority". User-authorities also allow scheduling when persons can enter, and for what area arming-levels this will be allowed. The four 'profiles' supported for each "Authority" allow selections to be customized for up to 4 different areas, or blocks of areas, as desired.

Additional "Door Class" settings for each user-authority and individual door, provide an additional control where access to specific doors is to be limited to persons with higher-authority—either all of the time, or on a scheduled basis.

Whether a card only, or card and/or PIN will be needed to gain entry is set separately for each reader. This can be all of the time, or with different requirements based on a repeating schedule.

Each reader can also be set as to whether a second valid user (or designated 'Escort') will be required to gain entry (all of the time, or based on a schedule).

**Note:** Users are given "Escort" status through their authority assignments.

### Area Arming / Disarming

The area(s) that blocks of users will be able to arm and disarm through a system keypad is based of the "Authority" assigned to each user.

As well, individual areas can be scheduled to either remind persons to arm the area, and/or have the area arm automatically at the scheduled time.

Areas can also be scheduled to switch between the "Off" and "Stay" arming level at desired times.

In addition, specific areas can be set to disarm (or have all areas disarm) when users with the appropriate authority are granted access.

### Door Unlocking & Relocking

User-authorities can optionally allow users to manually unlock doors in specific areas during their scheduled times (through a keypad or this software).

Doors can also be set to unlock in sync with a schedule and/or the arming level for the area(s) associated with the door.

Scheduled door unlockings can also be held until the first valid user gains entry (after the scheduled unlock time).

**Tip:** This helps to maintain security in the event of a key person being delayed due to a storm, vehicle breakdown, etc.

### Monitoring of Doors and Sensors in an Area

Monitoring settings can be customized as desired—both on an area-by-area basis, and for each individual reader/door and monitored sensor.

Area and device monitoring is primarily based on the present arming-level for the area:

**On:** All sensors monitored;
**Stay:** Area perimeter sensors and doors, fire/safety (24 hr) sensors, and tampering;
**Off:** Only fire/safety (24 hr) sensors, and tampering.

The authority assigned to each user determines who can disarm each area, and when. As well, users can be given the authority to check status, and perform other tasks through a system keypad.

---

**See Also (Related Topics)**

- "Users (Entrants / Panel Users)"
- "Authorities for Users / Entrants",
- "Areas and Related Settings",
- "Schedules for user-Access and Area Automation"
- "Doors, Readers, and Related Settings"
- "Elevators (Lifts) and Associated Readers"
- "Floors (Pertaining to Access-Controlled Elevators / Lifts)"
- "Input Points—Monitored Sensors"

# Areas and Related Settings

## Areas and Related Settings

Areas allow setting up monitoring and operating characteristics for all sensors and/or readers in a common location (associated with a specific panel). Dividing a system into "areas" also allows user-authorities to be set up on an area-by-area basis.

Elevators and Floors: It is best to set up unique area(s) for use with elevators and the associated access hallways. This allows the authority to control elevators and floors to be separated from other features, and also helps to identify activity/alarm messages pertaining to elevator readers. (The authority to control elevators and floors pertains to the "Door Control" authority selection for the specific area.)

For an introduction to access-controlled areas relative to user-authority settings and door settings, refer to "Understanding Access-Controlled Areas".

Area scheduling can:

- Cause areas to arm and disarm automatically at the desired times;
- Have user's reminded to arm the area, and/or have an alarm transmitted to the monitoring station if users fail to do so.
- Provide automatic Stay-to-Off, and Off-to-Stay arming at scheduled times.

For details on setting up schedules, refer to "Schedules for User Access and Area Automation".

## Accessing the Area Configuration Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Areas** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Areas**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show config. topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Adding (Defining) a New Area

Access "Configuration⇨Areas" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one 'area' at a time;
Grid View: All defined 'areas' in a list.

If you change any value for an area, this will cause that area to be reset to its default / scheduled state **and arming level** (this allows configuration updates to be managed properly). To check or re-set status aspects, refer to the "Area" status/control topic.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

**Tip:** You can copy all settings for an Area, and paste them into another one: Right-click the 1st one (a blank portion if in 'Forms' view), and select **Copy**. Then, select a blank/new Area from the list, right-click again, and select **Paste**. After 'pasting', change the name and any settings as desired. **Note:** 'Copy' and 'Paste' are also available from the **Edit** menu.

## Viewing or Changing Settings for an Area

Access "Configuration⇨Areas" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired Area at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid view, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

## If you Need to Delete an Area

Before deleting an area, check to ensure that it is not assigned to any items (Modules, suite-security keypads, Input Points, Output Points, or Doors).

This can be done by viewing the topics for each of these items in '**grid**' view, and checking the "Area" column for the specific one. For details, refer to the "System Configuration" chapter in the table of contents (at the front of this guide).

Alternatively, you can issue reports on each of these items, and check for the specific 'Area' in the listings. For details, refer to the table of contents for the desired 'Reporting' topic(s).

Access "Configuration⇨Areas" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired Area at the bottom of the window.

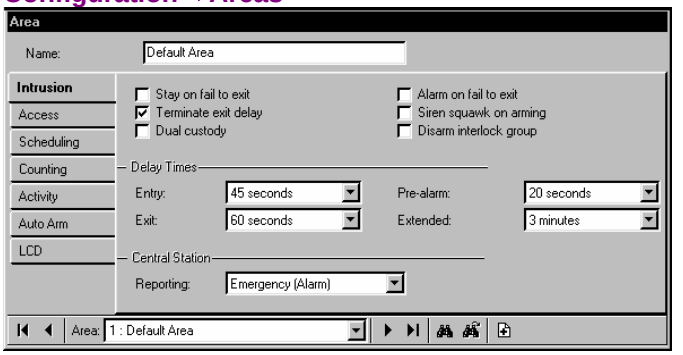
**Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired Area in the list, and select **Delete**. When asked to confirm, select **Yes**.)

**Note:** The 1st area for each panel cannot be deleted (i.e., each panel must have at least one area set up).

## Configuration ⇨Areas




## Pick-Lists (bottom of the Form)

-**Panel Group** & **Panel** references (optional)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".

- **Area:** This is where you select an area to view or edit. This shows a reference number assigned by the system, and the name of the selected area, once defined;

  "Offset" values for each panel determine whether multi-**panel** sites will have consecutive versus repeating area numbers. For details, refer to the "Display Offsets" value under "System Panels and Displayed Item-Numbers".

## Top of the Form

- **Name:** A suitable name for the area (e.g., "Warehouse").

( ⇨ )

## Intrusion (systems with monitored sensors)

- **Stay on Fail to Exit:** The area will automatically switch to 'Stay' mode if the user fails to exit after arming the area (i.e., if an entry/exit door in the area is not opened). This cannot be used in conjunction with 'Auto Arm on Fail to Close' (under "**Scheduling**", to follow);
- **Terminate Exit Delay:** The 'exit delay' will be truncated when the door closes after the user arms the area and exits.

  This is typically for smaller facilities where you can easily determine if others are still present. For a larger site, area scheduling is recommended (see "Scheduling", to follow/below).
- **Dual Custody:** Disarming this area will require two authorized user's to enter their ID and/or PIN (only one needed for arming).

  Visitor cards set to require an escort cannot be used with Dual Custody. Dual custody is also supported pertaining to gaining entry at individual readers. For details, look for the "Reader Mode" setting in the door-configuration section.

---

- **Alarm on Fail to Exit:** An alarm will be transmitted if the user fails to exit after arming the area (i.e., if an entry/exit door in the area is not opened);
- **Siren Squawk On Arming:** The 'siren' outputs for this area will be pulsed briefly when the area is armed;
- **Disarm Interlock Group:** Sets this as an interlocked area. Of all areas with this selected, only one can be disarmed at a time (except by a service technician).

### Delay Times

- **Entry:** The duration that the monitoring of 'Entry' points will be held/delayed to allow an authorized entrant to disarm the area;
- **Exit:** The duration that the monitoring of 'Exit' points will be held/delayed to allow the user to exit after arming the area.

  UL-Listed Systems: These must be 45 seconds or less for residential installations, and 60 seconds or less for commercial installations.

---

- **Pre-Alarm:** This is the duration that the system will wait before transmitting alarms from this area to the central monitoring station. During the delay, keypad sonalert(s) will be sounded, giving an authorized user time to "Silence" the alarm at a keypad. (Selecting "Verify User" will cancel the alarm transmission.)

  This setting works only with sensors (input-points) that support "Pre-Alarm Warning". For details, refer to "Input Points—Custom Point Types".

  To assign an area to be monitored by a specific keypad, refer to "Expansion Modules".
- **Extended:** The duration that the monitoring of 'Extended' points will be held/delayed to allow an authorized entrant to disarm the area;

  This pertains to a sensor that is set as a 'Custom Point Type' with the 'pre-process' defined as "Extended".

  For details, refer to "Input Points--Monitored Sensors", and "Input Points--Custom Point Types".

### Central Station

- **Reporting:** Whether only alarms are to be reported to the monitoring station, or all activity (incl. area arm/disarm, etc.).

  This setting does **NOT** limit events to appear in the monitoring window or to be available for activity reporting.)

  The area arming-levels for which detected activity at individual sensors will be transmitted is based on the input-point 'type' (or Equipment settings for 'pseudo' points). How the messages are transmitted is based on selections in the System Communications screen. For details, refer to "Input Points—Monitored Sensors", "Equipment Settings (Pseudo / Internal Inputs)", and/or "Monitoring, Paging, & Remote Mgt. Settings".

## Access

(systems with access-controlled doors)

- **Auto Disarm on Valid Token:** The area will automatically disarm when a person with disarm (Off) authority is granted entry to this area. This feature can be customized for groups of users as per their assigned 'authority' profile. For details on user authorities, refer to "Authorities for Users/Entrants".

### Bad Card Action

- **Block access to all users:** Determines whether or not all users will be denied access to this area whenever a 'Global Lockout' condition is in effect (per 'bad card/PIN' detection).

  Related: • Account Information ⇨Bad Card/PIN
  For details, refer to "Input Points—Monitored Sensors", "Equipment Settings (Pseudo / Internal Inputs)", and/or "Monitoring, Paging, & Remote Mgt. Settings".

### Antipassback

Antipassback (APB): A feature that blocks individual cards from being used to:

+ Re-enter the same area, or;
+ Re-enter the facility from 'outside', and/or;
+ (Optional): Enter other areas;

**…Unless** they are recorded as exiting first--i.e., each person must use their card/token at every reader they encounter (that is set to "Detect Antipassback"). **Tip:** This helps to protect against unauthorized card usage.
Note: Antipassback-controlled areas typically require 'Exit' readers on the inside (at each door).

- **Strict Entry/Exit Enforcement:** This enables antipassback checking between areas.

  This setting is used with high-security areas--such as a cash room. With this setting, persons who do not 'badge out' of the area will be denied access to **all** areas--even at readers **not** set for antipassback.

  Without "Strict APB", persons who do not 'badge out' of APB-controlled areas will only be blocked against re-entering their last known area, or re-entering the facility from 'outside' (see next setting).

- **Ignore Outside to Inside Area Check:** This setting causes readers (that are set to "Detect Antipassback") to allow entry from outside for persons who did not 'badge out' of the facility. **Tip:** This is typically for a parking garage 'area' without an exit reader.

  This does not override other APB conditions. The area being entered **cannot** be their last known area ("APB auto-reset" will override this--see next setting), and they must still 'badge out' of any areas that are set for "Strict APB Enforcement" (see previous setting).

- **Auto-Reset:** This allows selecting whether APB checking will be on-going, or for a set duration only (see details).

  None: Antipassback restrictions will be enforced on a continual basis;

  xx Min/Hrs: The antipassback restriction will be limited to a fixed period of time after each person is granted access to a specific area. (Each user's APB status will be reset, avoiding undesired 'APB violations'.)

  APB Auto-Reset (especially of short duration) is **not** recommended with Time and Attendance reporting applications (including "Roll-Call").

  Antipassback must also be enabled for each specific reader. To do this, refer to "Reader 1 & 2 Settings for a Door" ("Detect Antipassback" selection).

  The antipassback status can be reset for a specific user, or for all users in a specific area (to allow their next entry or exit regardless of their previous APB status). For details, refer to "Resetting Users' Antipassback Status", and/or "Resetting the Antipassback Status for Users in a Specific Area" in the Control & Status Chapter.

## Scheduling

### Arm/Disarm Scheduling

- **Schedule:** The open/close schedule to be associated with this area (or 'none'). At the scheduled 'closing' time, area keypads will beep to remind staff to either arm the area and exit, or delay the closing time (worklate). If neither of these actions occur, an alarm can be transmitted, and/or the area can be armed automatically (as per settings to follow).

  **Tip:** Pause the mouse cursor over a schedule in the list to see the settings for that schedule.

  To define a schedule, refer to "Schedules for User Access and Area Automation".

  A programmable output can be set to signal when the area closing time is approaching. For details, refer to "Programmable Outputs".

- **Out of Schedule:** The length of time before the area will automatically 're-close' after an 'emergency off' is performed (i.e., being disarmed **outside** of the schedule). This limits the time that an "Emergency Off" can remain in effect.

- **In Schedule:** The length of time before the area will automatically 're-close' after being disarmed **inside** of the schedule. This allows limiting the time that authorized users can remain in the

area during the schedule (e.g., cash machines, vaults, etc.).

- **Work Late Input:** When someone presses a work-late button in this area (during the 'pre-arm cycle), the scheduled closing time with be set as {*value selected here*} from the present time.

  **Note:** A worklate button is a custom input point with its 'pre-process' set as "Worklate". To define a 'work late' input-point, refer to "Input Points—Custom Point Types", and "Input Points—Monitored Sensors".

- **Limit Work Late to Midnight:** User's ability to 'Work Late' (i.e., override the scheduled 'Close' time) for this area will be limited to not extend beyond midnight.

- **Transmit Fail to Close:** Transmit a "Fail-to-Close" to the monitoring station if the area has not been armed at the scheduled closing time.

- **Auto Arm on Fail to Close:** The area will auto-arm at the scheduled closing time. This cannot be used in conjunction with 'Stay on Fail to Exit' (described above).

---

- **Allow Out of Schedule Opens:** Whether or not users **without** '24-hr' authority will be able to gain entry and/or disarm this area outside of **its** open/close schedule, and/or adjust the area closing time (i.e., 'worklate') after **their** schedule has expired. (For a non- scheduled area, this concept does not apply, since only 'Disarm' authority would be required.) For details on user authorities, refer to "Authorities for Users/Entrants".

### Stay-Off-Stay Scheduling

- **Schedule:** A schedule to be associated with automated stay/off/stay arming in this area (also see next setting).

  **Tip:** Pause the mouse cursor over a schedule in the list to see the settings for that schedule.

- **Auto Stay Mode:** Specifies that the area will automatically switch from 'Stay' to 'Off', and then 'Off' to 'Stay', in-sync with schedule chosen above. This will not occur if the area is fully armed (ON) at the applicable times.
  - + **None:** Disables this feature (same as selecting "None" for the schedule.
  - + **Non secure Disarm to Off:** The area will disarm (e.g., at the start of the day) if it is in 'stay' mode at the specific time;
  - + **Secure Disarm to Off:** For the area to be disarmed (to off) at the scheduled time, the area must be armed to 'Stay', and it must have been fully armed once since the last cycle (ensures someone was in the facility to arm the area at some time);
  - + **Disarm to Off Pending First Valid User:** The area will disarm to off if it is in 'stay' mode at the scheduled time, but the change will not occur until a valid user is granted access into the area.

---

## Counting (≥ V4.20)

These selections pertain to monitoring the number of people (or vehicles, etc.) in an area at any one time (per access-granted), and whether or not the area can be armed with persons still listed as being in the area.

### User Counter

- **Maximum:** (0 - 16383) The maximum number of users/vehicles allowed in an area before its status will be "full".

  Tip: This can be used to trigger an output (e.g., "Parking Lot Full" sign).

  **Minimum:** (0 - 15) The number of users that can be present with the area still being considered 'empty";

  **Count Mode:** 'Normal' or 'Special (APB based):

  Normal: Area entering = +1, area leaving = -1.

  Special: Area entering = +1, last known area = -1. (Exception: Same as 'Normal' for "Timed APB" once the timer expires.)

  **Warning Level on Arm:** Whether a person trying to arm this area when it isn't listed as "Empty" will only be warned, or whether arming will be blocked altogether (manually vs. any method);

### Counter Reset

These settings allow the user-count for a scheduled area to be reset (to zero) automatically under certain conditions.

**Reset before 'in window':** This resets the area user-count automatically at a relative time of day (a specified number of hours before the beginning of the area's schedule);

**Reset on Disarm to OFF:** Whether or not the area user-count will be reset automatically whenever the area is disarmed to "Off";

**Reset on arm to ON:** Whether or not the area user-count will be reset automatically whenever the area is armed to "On".

Related: • Configuration ⇨Doors ⇨Extended ⇨"Entry Detect"; • Configuration ⇨Output Points ⇨Event ⇨(counter reaches min/max); • Control & Status ⇨Panel Control & Status ⇨Area ⇨Area Users.

## Activity (≥ V4.20)

These settings allow enabling and configuring 'activity' detection for each area. This: • Pertains to custom 'Activity Monitor' input points; • Can include persons gaining entry at doors/gates; • Can include detection via input points on the "Entry/Exit Route". More: "Related", & "**Auto Arm**".

- **Timeout:** This allows disabling 'activity' detection for each area, or setting the maximum duration between activity-detections for it to still be considered 'in effect'. (The status is reset if activity is not detected for this duration.)

  Notes: Immediate = 1 second. Short durations are not recommended. This is the only method for resetting 'activity' status.

- **Include EE Route:** Whether or not inputs on the entry/exit route for this area will be monitored as well as 'Activity Monitor' inputs;

- **Include Doors:** Whether or not persons entering and leaving the area will trigger the 'activity' status as well (i.e., door openings).

Related Settings / Features:
• Configuration ⇨Custom Point Type ⇨"Preprocess = Activity Monitor"; • Configuration ⇨Output Points ⇨Event ⇨"Activity detected" (or 'not'); • Control & Status ⇨Panel Control & Status ⇨Area ⇨Area Users.

## Auto Arm (≥ V4.20)

These settings allow having an area arm automatically: • When a/the door closes; • When there is 'No Activity', and/or; • When no one is present (user-count ≤ 'minimum'). Auto-arming based on 'activity' and 'user-count' can also be tied to the arm/disarm schedule for each area.

### Special

- **Auto Arm on Door Close:** The area will arm automatically when any 'door' point in this area closes (typ. used with bank vaults).

### Extended Auto Arm

- **Mode:** Selections to have the area arm automatically when there is no activity detected and/or when no one is present (user-count ≤ 'minimum');

  **Arming delay:** Select a value here to have the preceding auto-arm (mode) selection delayed (not occur) for a set period of time;

  **Arming level:** This sets the arming level for activity or user-count based auto-arming (arm to 'Stay', or fully arm to 'On');

  Stay: Only perimeter sensors monitored;
  ON: All sensors monitored.

  **Arm only if arm/disarm schedule is 'out of window':** This determines if the 'activity' / 'user-count' auto-arming will occur only outside of the arming schedule.

  Related: Configuration ⇨Doors ⇨Extended ⇨"Entry Detect".

## LCD

- **LCD Name:** A shorter version of the name to be displayed at LCD keypads. This is assigned automatically, and can also be changed if desired (max. 12 chars., plain text).

- **Require Function Key PIN:** Whether or not the programmable hot-keys 6-9 & 0 will require a user with "Function Key" authority to be logged in. (Function keys 1-5 do not require ID/PIN entry, except at a portable/wireless arming keypad).

  **Tip:** This setting is recommended to help protect against false alarms.

  For details on **using** the function keys on a system LCD keypad, refer to the MONITOR ISM (panel/keypad) User's Guide.

  What each function key does is set up under "Programmable Outputs".

  To enable function-key authority for a user, refer to the "Function Keys" setting under "Authorities for Users/Entrants".

# Expansion Modules

**Suite-Security Keypads:**
To set up a suite-security keypad, refer to "Suite-Security Keypads and Related Settings".

## Expansion Modules and Related Settings

Expansion modules are devices that provide support for additional inputs, outputs, and/or special features. Some examples include:

- System LCD keypads;
- Door Controller (2 doors / 4 readers);
- Elevator / Lift Controller (2 cabs, with one reader per cab; max. 124 floors);
- Point Expander (8 or 16 input points; and 4 programmable outputs);
- RF / Wireless Point Expansion (32 inputs);
- Fire Supervision module;
- Map/Graphic Annunciator;
- High-security communications module (uses Mark7 / DVACS service in Canada).

For each **panel**, up to 24 modules can be set up (or up to 60 suite-security keypads), including support for up to 32 doors.

Converted TDC/PDC Door Controller Modules: Up to 10 (combined) per system panel.

**Note:** To initially set up a system module, you will need to know its serial number. This is typically hand-written on a small sticker on the circuit board).

## Accessing the Module Configuration Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Modules** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Modules** .

(Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Adding a New Module

Access "Configuration⇨Modules" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one 'module' at a time;
Grid View: All defined 'modules' in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

**Note:** Some modules (HSC/printer module, RF/wireless module, and Smart POD) require additional programming locally, through a system keypad. For details, refer to your MONITOR ISM Commissioning Reference Guide.

## Viewing or Changing Settings for a Module

Access "Configuration⇨Modules" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired Module at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid View, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

## If a Module is Replaced

If a defective or damaged module is replaced, be sure to identify the new module's **"Serial Number"** to the software. (See the "Serial Number" description for details.)

---

Then, issue a "Send to Panel" communications session to transfer all settings to the associated panel.

For details, refer to "Panel Communications and Updates".

## If you Need to Delete a Module

**Attention:** If a module is deleted, or changed with respect to the number of points or outputs, the I/O range adjusts accordingly. As such, all points/outputs pertaining to this expansion-module number and higher will need to be **reconfigured**.

As well, before deleting a Module, you'll need to check that it's not associated with any **Doors** (delete the doors or correct their module association first).

This can be done by viewing the "Door" topic in '**grid**' view, and checking the "Module" column for the specific one. For details, refer to "Doors, Readers, and Related Settings".

Alternatively, you can issue a Door report, and look for the specific module in the listing.

For details, refer to the table of contents for the desired 'Reporting' topic(s).

Access "Configuration⇨Modules" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired Module at the bottom of the window. **Tip:** You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid View, right-click the desired Module in the list, and select **Delete**. When asked to confirm, select **Yes**.)

For details on reconfiguring the input points and programmable outputs, refer to "Input Points—Monitored Sensors", and/or "Programmable Outputs".

Sample screens and selection-descriptions appear on the following pages.

## Pick-Lists (bottom of the Form)

-**Panel Group** & **Panel** references (optional)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".

- **Module:** This is where you select a module to view or edit. This area shows a reference number assigned by the system, and the name of the selected module, once defined;

## Top of the Form

- **Name:** A suitable name / location for the module (up to 30 characters).

---

## Standard

- **Serial Number:** The actual serial number of the expansion module. **Tip:** The serial number is typically hand-written (5 digits) on a small sticker on the circuit board.

  Converted TDC/PDC Door Controllers: Enter the 'address' of the door controller (as set via jumpers or switches on the board).

- **Monitor Communications and Tamper Sensors:** Whether or not module communications, and the module housing tamper sensor are to be monitored (recommended);

### Module Type

- This area allows selecting the type of module you are setting up.

  Tip: During each communications session with the panel, the module types are checked and displayed here as well.

---

## I/O (for modules that support inputs and outputs)

- **Inputs:** The number of input points (monitored sensors) supported by this module;

  **Note:** The first 3 inputs on a system LCD keypad pertain to the built-in emergency keys rather than external sensors.

- **Outputs:** The number of outputs (programmable electronic switches) on the device;

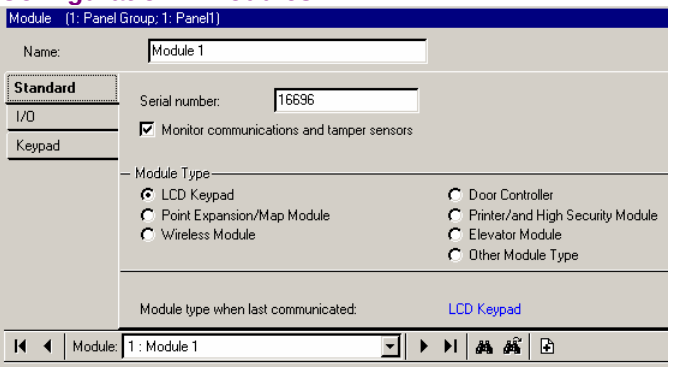
  **Note:** Outputs on a "Map" module pertain to firing the LEDs on the module itself rather than triggering external devices.

---

- **Input Range:** The input point numbers to be associated with this expansion module.
- **Output Range:** The range of programmable output-point numbers to be associated with this expansion module.

Input and Output Range: The Number-Range for inputs & outputs is based on the number of inputs and outputs supported by each module, and the order the modules are installed--plus the "Display Offset" settings for the specific panel. For details on the "Display Offset" value, refer to "System Panels and Displayed Item-Numbers".

## Configuration ⇨Modules




## Keypad (settings for LCD Keypads)

- **Assigned to Area:** The 'area' that this keypad is associated with;
- **Exit Delay When Arming:** Whether or not an exit delay is to be in effect when arming the keypad's area to 'Stay' and/or 'On'. (Arming any other areas from this keypad will be immediate).

'Stay' pertains to 'perimeter' sensors being monitored, and 'On' pertains to all sensors in the area being monitored.

- **Entry and Exit Tones on Stay Mode:** Whether or not Entry/Exit tones are to be sounded at this keypad while the associated area is set to the STAY arming level.
- **Annunciation (List of Areas):** This portion of the screen allows selecting the area(s) to be monitored by this keypad (i.e., the areas for which any associated alarms will be signalled at the sonalert built into this keypad).

# Suite-Security Keypads and Related Settings

If you change any value for a suite-security keypad, this will cause that unit to be reset to its default / scheduled state **and arming level** (this allows configuration updates to be managed properly). As such, configuration changes to active units should be done only by arrangement with the occupant.

## Suite-Security Keypads

Suite-security keypad modules provide security and monitoring features for individual apartments facilities (up to 60 per main panel).

There are two types of suite-security keypads:

- **8-zone**: This version supports 8 monitored sensors (inputs), 2 programmable outputs, and 3 'panic keys'.
- **2-zone**: The more affordable 2-zone units support 2 monitored sensors/inputs, one panic key, and one programmable output.

Two-zone units require panel firmware V3.2 or higher. With 8-zone units, panel firmware **v2.7** or **V3.2** (or higher) is recommended.

Suite-security keypads can be mixed with other modules if desired (the suite capacity is reduced by **5** for each system LCD keypad, and each other expansion / application module added.

Support for suite-security keypads requires a 'feature-set' selection of **5** or higher (via Enterprise software licensing).

For details, refer to "Account-Wide Panel Settings", and "Software Activation and Licensing".

**Notice:** Suite-security keypads are NOT associated with any system 'Areas' or related schedules or settings. As well, these units are NOT associated with the module screen. All settings that affect suite-security-keypad operation are defined here. As well, suite/keypad alarms are monitored only through the Director software.

## Accessing this Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Suite Security** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Suite Security**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Adding a New Suite-Security Keypad

Access "Configuration⇨Suite Security" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one suite/facility at a time;
Grid View: All defined suites in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

**Tip:** The 'Standard' tab typically includes all settings required for basic operation (and additional tabs contain more advanced features).

### Viewing or Changing Settings for a Suite-Security Keypad

Access "Configuration⇨Suite Security" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired suite at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid View, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

### If a Suite-Security Keypad is Replaced

If a defective or damaged unit is replaced, be sure to identify the new keypad's **"Serial Number"** to the software. (See the "Serial Number" description for details.)

---

Then, issue a "Send to Panel" communications session to transfer all settings to the associated panel.

For details, refer to "Panel Communications and Updates".

### If you Need to Delete a Suite / Keypad

**Attention:** If a suite-security keypad is deleted, the 'user offsets' pertaining to this suite/facility number and higher may need to be **reconfigured**. (See the description for "First User Access" for details.)

Access "Configuration⇨Suite Security" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired suite at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid View, right-click the desired unit in the list, and select **Delete**. When asked to confirm, select **Yes**.)

Now, access each of the other suite-security keypads, and check that the "User Access Range" is set correctly, making any necessary changes as you go along.

**Tip:** If desired, you can automatically reset the users for all defined keypads (or up to a desired one) to the default of consecutive blocks of 8: Select the highest numbered keypad to be affected. Then, right-click anywhere on its form, and select **Auto Fill User Offset**. When asked to confirm, select **Yes**.

Sample screens and selection-descriptions appear on the following pages.

## Pick-Lists (bottom of the Form)

-**Panel Group** & **Panel** references (optional)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".

- **Suite:** This is where you select a suite-security keypad to view or edit. This area shows a reference number assigned by the system, and the name of the 'suite' or keypad, once defined;

"Offset" values for each panel determine whether multi-**panel** sites will have consecutive versus repeating keypad ID-numbers. For details, refer to the "Display Offsets" value under "System Panels and Displayed Item-Numbers".

## Top of the Form

- **Name:** A suitable name/location to be associated with the suite or keypad (such as the suite number and/or occupant);

## Standard

- **Serial Number:** The actual serial number of the suite-security keypad. **Tip:** The serial number is typically hand-written (5 digits) on a small sticker on the circuit board.
- **Keypad Type:** Two-zone (compact) versus 8-zone (full-featured);
- **First User Access:** Users with access to suite keypads are reserved in blocks of 8 (such as 1st suite: users **1**-8, 2nd suite: users **9**-16, etc.). This value is the lowest user-ID to pertain to this suite/keypad. This number must be a multiple of 8, plus 1.

To set up the person associated with each user-ID, refer to "Users (Entrants / Panel Users)".

**Tip:** If desired, you can automatically reset the users for all defined keypads (or up to a desired one) to the default of consecutive blocks of 8: Select the highest numbered keypad to be affected. Then, right-click anywhere on its form, and select **Auto Fill User Offset**. When asked to confirm, select **Yes**.

---

- **Last Communicated:** During each communications session, the software will check the keypad type, and display it here.
- **User Access Range:** This shows the range of user ID numbers to pertain to this suite/keypad, based on the 'First User Access' value (prev.).

---

- **Floor:** The is the floor associated with the suite/facility (or the lower of two for suites that can be accessed from two floors).
- **Additional Floor:** Select this if the suite/facility can be accessed from two floors.
- **LCD Name:** A shorter version of the name to be displayed at LCD keypads. This is assigned automatically, and can also be changed if desired (max. 12 chars., plain text).

## Extended

- **Entry Delay:** The duration that the monitoring of 'Entry' points will be held/delayed to allow an authorized entrant to disarm the suite-security system;
- **Exit delay:** The duration that the monitoring of 'Exit' points will be held/delayed to allow the user to exit after arming the keypad.
- **Extended Point Delay:** The duration that the monitoring of 'Extended-Delay' points will be held/delayed to allow an authorized entrant to disarm the keypad.
- **Siren Time:** This sets the duration for siren activations for this suite-security keypad.

The Siren Feature: This pertains to keypad inputs (and panic keys) set to trigger a siren condition—as signalled by output #1 (must be set to one of the "Area: Siren Fire" selections--which also sets the 'cadence').

**Also see:** Inputs, Outputs, and Panic (to follow), and: "Input Points—Custom Point Types"

- **Stay on Fail to Exit:** The suite-security system will be automatically switched to 'Stay' mode if the user fails to exit after arming (i.e., if a door opening is not detected).
- **Terminate Exit Delay:** The 'exit delay' will be truncated when the door closes after the user arms the keypad and exits.
- **Require Function Key PIN:** Whether or not use of the keypad function-keys will require a valid keypad user to be logged in.

**Tip:** This setting is recommended to help protect against false alarms.

For details on **using** the function keys (special commands) on a suite-security keypad, refer to the user's guide for the keypad.

To enable function-key authority for a suite occupant,

refer to the "Function Keys" setting under "Authorities for Users/Entrants".

- **Enable Quick Arming:** If this is NOT selected, keypad arming functions will require entering your PIN (person with appropriate authority). If this IS selected, the keypad arming functions will NOT require PIN entry;
- **Allow Forced Arm:** Whether or not the suite-security system can be armed while any sensors are tripped (i.e., Not OK).
- **Auto Arm on Door Close:** The keypad will arm automatically when the door is closed. This would be used **only** for a separate keypad that is monitoring a safe/vault or 'valuables' locker.

## Inputs

- **Point Type:** The type of sensor/monitoring to be used with each input connection (E/E door, PIR, etc.), and whether or not the sensor is on the perimeter of the suite/facility.

  **Tip:** Pause the mouse cursor over a point-type in the list to view its characteristics. **Note:** Use the 'Entry/Exit Door' input-point type for doors (door sensors / contacts) on the perimeter of the suite/facility.

  Note: Suite/keypad alarms are monitored only through the Director software. ('Transmit' characteristics for input points are ignored.)

  Two-zone Keypads: These units support input points 1 and 2 only.

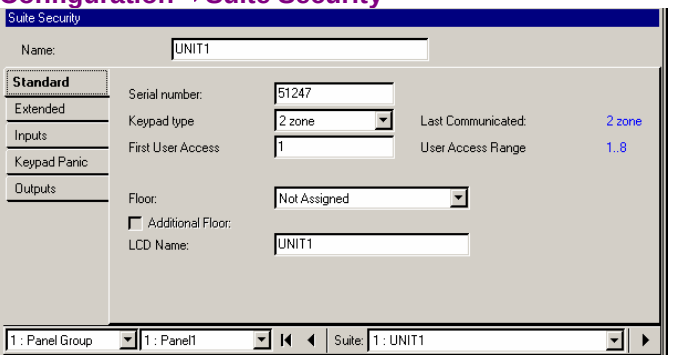
  Custom Point Types can be set up for special applications (including extended delay).
  **See:** "Input Points--Custom Point Types".
- **Circuit Type:** The type of circuit/wiring used with the input point / sensor;

## Keypad Panic

- **Point Type:** The type of alarm to be generated (E/E door, PIR, etc.) when someone presses each of the three panic-key pairs on the suite-security keypad. **Tip:** Pause the mouse cursor over a point-type in the list to view its characteristics.

  Two-Zone Keypads: These units support the first panic key only (triggered by pressing * and #.

## Configuration ⇨Suite Security




- **Audible Alarm:** Whether or not an audible alarm is to be sounded when a panic key is pressed.

## Outputs

- **Type:** The general type of event that will trigger the output. These include "Area" (suite), "'Point", or "Function Key";

  Two-Zone Keypads: These units support output #1 only.

  Function keys: **Rem:** 8-zone keypad: ƒ**+1** or ƒ**+2**; Two-zone: ∗**+5**. These can be assigned as positive or negative—indicating whether the output will be set to +12V (positive) or 0V/Gnd (negative) when the function keys are pressed. Exception: 2-zone = Neg. (0V/Gnd) only.

  Area (Suite) **Siren** Applications: Use output #1 for this.

  'Toggle' Function: To have a function key 'toggle' the state of output #1 (only), use the following settings:

| Type | Function | Delay |
|---|---|---|
| Function Key (Positive Logic) | Function Key 1 (or 2) | None |

- **Point No.** (for 'point' type functions)**:** A specific point to be monitored for the "Function" selected below.
- **Function:** The specific event/action that will trigger the output;
- **Delay** (for function keys): Function keys can be set to either 'toggle' the state of the output (activate/deactivate), or to trigger the output for a set period of time (from 1 second to 1 week).

The maximum number of delayed function keys that can be set up for each panel is 35 (i.e., that are not set to 'toggle' or '1 second').

# Doors, Readers, and Related Settings

If you change any value for a reader/door, this will cause that device to be reset to its default / scheduled state (this allows configuration updates to be managed properly). To check or re-set status aspects, refer to the "Door" status/control topic.

## Introduction to Access-Controlled Doors

"Access-control" (who can go where and when) can be easily integrated into the system using door-control modules. This controlled access can be added for up to **32** doors per panel (with 1 or 2 readers per door).

Door capacity and type(s) of door controllers supported depends on your software licensing agreement, which is managed through the 'activation key' on the parallel (or USB) port of the server (or only) PC (and the licensing software provided).

Elevators: The door capacity is shared with elevators (max. 32 combined). Elevators also share the door numbering (and panel memory space), and will be listed along with the doors (editable under "Elevator" only). Tip: You can define elevators at the end of the list, or click **[Filter]** on the toolbar to show only the numbers associated with doors.

**Also See:** Elevators (Lifts) and Associated Readers.

The entry-requirements for each reader / door can be configured to meet your specific requirements. As well, many items can be set to a rotating schedule, allowing different parameters to be in effect after-hours.

To read an overview on how access-controlled doors operate relative to user-authority settings and area settings, refer to "Understanding Access-Controlled Areas".

Two card types can be set up, allowing either Wiegand / Prox and Magstripe / barcode, or two types of Wiegand / Prox cards to be supported (at the same time) at each specific panel. For details on setting up the card/token format, refer to "System Card-Access Settings".

Wiegand-output reader keypads are supported for Card+PIN (and PIN-Only) entry modes and signalling duress. Matrix-style keypads (i.e., that require additional connections) are supported only via converted TDC and PDC door controllers.

To set up monitoring for an Entry/Exit door that is NOT electronically controlled for personnel access, refer to "Inputs—Monitored Sensors".

## Accessing the Door Configuration Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Doors** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Doors**.

(Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Adding a Door to the System

(Before adding a door, the applicable door-controller module should be set up. For details, refer to "Expansion Modules".)

Access "Configuration⇨Doors" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one door at a time;
Grid View: All defined doors in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this portion of the door screen while entering and/or selecting your desired settings.

**Tip:** Check the 'Standard' and 'Reader' tabs for basic settings. (Additional tabs contain optional features.)

**Tip:** You can copy all settings for a Door, and paste them into another one: Right-click the 1st one (a blank area if in 'Forms' view), and select **Copy**. Then, select a blank/new door from the list, right-click again, and select **Paste**. After 'pasting', change the name and any settings as desired. **Note:** 'Copy' and 'Paste' are also available from the **Edit** menu.

### Viewing or Changing Settings for a Door and Its Associated Readers

Access "Configuration⇨Doors" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired Door at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid View, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this portion of the door screen while viewing or changing settings as desired.

### If you Need to Delete a Door

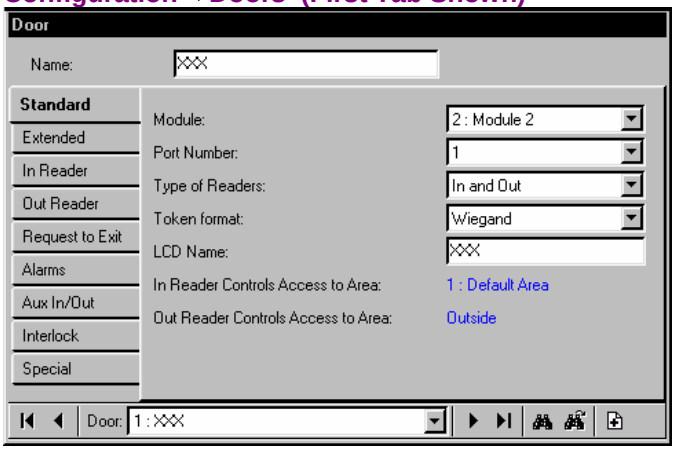
Access "Configuration⇨Doors" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired door at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired Door in the list, and select **Delete**. When asked to confirm, select **Yes**.)

## Configuration ⇨Doors (First Tab Shown)




## Pick-Lists (bottom of the form)

-**Panel Group** & **Panel** references (optional)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".

- **Door:** This is where you select a door to view or edit. This area shows a reference number assigned by the system, and the name of the selected door, once defined;

If the Name is Shown as "Elevator" (and the form is blank): These screens are placeholders for elevators (click **[Filter]** on the toolbar to hide elevator references).

"Offset" values for each panel determine whether multi-**panel** sites will have consecutive versus repeating door numbers. For details, refer to the "Display Offsets" value under "System Panels and Displayed Item-Numbers".

## Top of The Form

- **Name:** A suitable name/location for the door;

Descriptions of the items on each 'tab' appear on the following pages.

## Standard

- **Module:** The number (from the MODULE screen) for the door controller module associated with the specific reader/door.
- **Port Number:** Whether this is the 1st or 2nd door on the selected door-controller module;
- **Type of Readers:** This identifies whether there are one or two readers associated with this door ("In Only" vs. "In and Out");

  Exception: For any door between two monitored areas, select "IN and Out" here, and set the area for the 2nd reader (even if it is not present). (Provides an 'entry delay' in both directions when the area(s) are armed.)
- **Token Format:** The card/token format associated with this door. Up to two card/token formats are supported for each panel, as defined through the System Access screen.

  "Wiegand" pertains to cards/tokens for readers with Wiegand data-format (Wiegand, Proximity, etc.). Similarly, "Magstripe" pertains to cards for readers with magstripe output (magstripe, bar-code, etc.).

  For details on setting up the card/token format, refer to "System Card-Access Settings".
- **LCD Name:** A shorter version of the name to be displayed at LCD keypads. This is assigned automatically, and can also be changed if desired (max. 12 chars., plain text).
- **Controls Access to Area**, and; **Out Reader Controls Access to Area:** This shows the area(s) associated with this door--as selected on the tab for each reader (to follow/below);

# 🗀 Extended 🗀

## Unlock Time

- **Standard:** This is the duration that the door will unlock when access is granted for a typical entrant/user.
- **Challenged/Extended:** This is the duration that the door will unlock when access is granted for a user who is set for "Extended Delay/Challenged".

## Auto Unlock

- **Schedule / "In Schedule" / "Out of Schedule":** The schedule and conditions required for the door to unlock automatically based on a schedule.

  If a schedule is selected, the times 'Outside' of the schedule are treated in a similar manner to 'Inside' of the schedule. (For example: You can have the door unlocked inside of the active schedule, and also unlocked after-hours, but only if/when the area is also disarmed.)

  To have the door simply re-lock at the closing time, set the "In Schedule" value as desired, and set the "Out of Schedule" value to "**Locked**".

  To have the door unlocking follow the area arming-state only, set the schedule to "**None**", and "In Schedule" to either "**Area is Off**", or "**Area is Stay/Off**", as desired.

  If you do **not** want the door to unlock automatically based on a schedule and/or the area arming-state, set the "Schedule" to "**None**", and the 'In Schedule' value to "**Locked**".

## Circuit

With converted TDC/PDC door controllers, this setting does not apply.

- **Reader Tamper Circuit:** This is the type of circuit/wiring used with the reader tamper circuit for this door.

  Not Required: This disables the reader tamper input (i.e., the tamper input will not be monitored).

  Converted TDC/PDC Door Controllers: These units do not support dedicated/separate reader tamper monitoring.

- **Door Circuit:** This is the type of circuit/wiring used with the door contact for this door.

## Other

- **Door Arming Level:** The area arming levels for which the door is to be monitored.

  **Tip:** You may wish to use "Stay and On" with doors used to enter the facility, and "On Only" for all doors within the facility.

- **Bi-Colour LED Mode:** Select this if the reader at this door has a single bi-colour LED (instead of the two separate LEDs). This setting **must** also be used if an 'arming station' is present.

  **Note:** Arming-station wiring differs from other readers (ensure the proper installation instructions have been followed).

- **Entry Detect:** If selected (✓), persons will not be considered "In" the new area if they are granted entry, but do not open the door.

  Tip: This affects the in/out status of applicable users, and allows them to badge again to gain entry with antipassback turned on (see "Detect Antipassback", to follow / below).

  Related: Configuration ⇨Areas ⇨**Counting**🗀 and **Auto Arm**🗀.
  Note: This does NOT affect 'Activity' detection (Cfg.⇨Areas ⇨Activity🗀).

# Reader 1 & 2 Settings for a Door

## Defining a 'Required Attendance' Zone

For time and attendance reporting, a 'required attendance zone must be defined by setting the "Area" as "Outside" for all readers used to **exit** from this zone.

See the "Area" description for more information.

**Note:** For proper time and attendance tracking, there must be no other way to exit from the required-attendance area (all exit doors must have a reader).

---

## 🗀 In Reader 🗀
## (and 'Out Reader'--if applicable)

**Note:** "In Reader" pertains to the **1st** (or only) reader for this door. "Out Reader" pertains to the **2nd** reader for this door (if applicable).

The second reader, and In/Out processing is NOT supported on the older (2-reader) version of the door controller module.

- **Access to Area:** This is the area associated with this reader (i.e., the area being **entered** when using this reader).

  Time and attendance reporting requires that all readers used to exit from the "required attendance zone" be set as "Outside".

  This will typically pertain to the interior readers on the perimeter of the facility, and may also include additional readers (such as that allow entry to a cafeteria or fitness room).

### Card Mode

- **Schedule**, and **In / Out of schedule:** These settings specify the basic method that entrants will have to use to gain entry at this door—i.e., via access token with or without keying-in a PIN at the reader. If scheduled, different entry requirements can be selected for when the schedule is active versus outside of the chosen schedule.

  UID vs. Card Number: The system can be set to require a full card number instead of the user-ID number. (Wherever you see "UID", a card number would have to be entered instead.)
  Related Topic: Account-Wide Panel Settings (look for "**Setup**🗀", and then "**User Logon Mode**").

  Card/PIN: "Card or PIN" means "Card-Only, or User-ID+PIN". With "Card+PIN", the card must be presented (does not allow UID+PIN).

  Manual Disarming: For an armed area that is NOT set to 'Auto Disarm on Valid Token', the user will also have to access the alarm system and disarm the area. For details on the "Auto-Disarm" feature, refer to "Areas and Related Settings".

### Reader Mode

- **Schedule**, and **In / Out of schedule:** These settings specify whether one user can enter, or if a second valid user (or designated 'escort') will be required to enter their Card/PIN as well. If scheduled, different entry requirements can be selected for when the schedule is active versus outside of the chosen schedule.

  With "Dual Custody", two different users must present their card and/or PIN (and neither of them can be set as "Visitor--Escort Required").

  When set to "Escort", a valid 'escort' can also enter on their own by presenting their card/PIN twice. If visitor cards (set to require an escort) are presented, **visitor** escort processing will take over (e.g., with visitor processing, you can set the type of cards escorts can use). Users are defined as escorts (escort privilege) through their authority assignments.

  Related Topics:

  - Authorities, ⇨Profile 1-4🗀, ⇨Access🗀, ⇨**Escort Privilege**, and **Visitor (Escort Required)**. See: Authorities for Users / Entrants.
  - Type of Cards that can Escort Visitors: Under "Account-Wide Panel Settings", look for "Setup🗀", then "**Escort-Required Mode**".
  - Dual custody is also supported pertaining to the disarming of an area. For details, refer to "Areas and Related Settings".

### Lockout

- **Schedule / Mode:** These settings specify whether all users are to be denied entry either while a selected schedule is active, or outside of the chosen schedule. **Tip:** To disable this feature, select "None" for the schedule.

  Users with 'Master Override' authority can enter while a 'lockout' is in effect. For details refer to the "Master Override" setting under "Authorities for Users/Entrants".

### Miscellaneous

- **Arming Station:** Select this to identify an "arming station".

  An arming station includes a Wiegand reader with keypad, and supports additional functions for arming and disarming areas, adjusting the area closing time (worklate), etc. For details, refer to the User's Guide for your MONITOR ISM system (panel/LCD keypad).

  **Note:** Arming-station wiring differs from other readers

(ensure the proper installation instructions have been followed).

- **Enable Class Checking:**
  Selected (✓): This selection is **required** if user-access to this reader is to be controlled based on time of day and/or door class. See **[Class Map]** to follow/below.
  Not Selected: Provides 24-hr access/egress to all valid cards regardless of the users' assigned schedule and door class authorities.

## [Class Map]

- **Schedule, In / Out of schedule**, and **Class A/B/C:** These settings allow restricting access to only the users with specific door-class authority, and/or optionally blocking after-hours access to this specific reader (except users with 'Master Override' authority). If scheduled, a different set of door-class requirements can be selected for when the schedule is active versus outside of the chosen schedule.

  To block after-hours access to this reader, select "Out of Schedule" ⇨None. To remove class restrictions at this reader (without bypassing each user's assigned schedule), select A✓, B✓, C✓ for both "In Schedule" and "Out of Schedule".

  Related Settings:

  - User's door-class authorities and scheduling are set under: Authorities, ⇨Profile 1-4🗀, ⇨**Door Class**🗀. See: Authorities for Users / Entrants.

---

- **Log APB Violation Only:** This will cause APB violations to be recorded, while allowing the person to enter.
- **Detect Antipassback:** This enables / disables the Antipassback feature for this reader.

  Antipassback (APB): A feature that blocks individual cards from being used to:

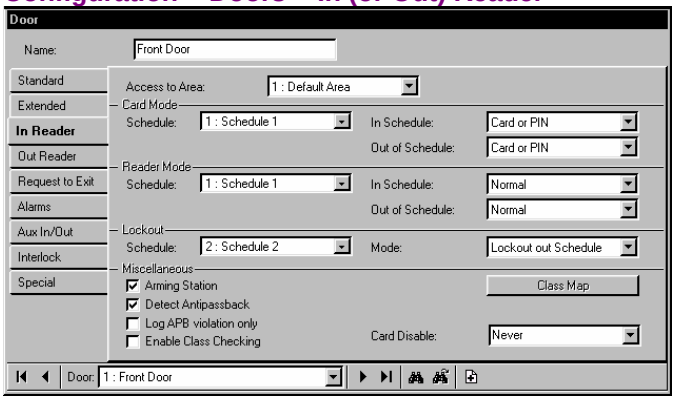
  + Re-enter the same area, or;
  + Re-enter the facility from 'outside', and/or;
  + (Optional): Enter other areas;

  **...Unless** they are recorded as exiting first--i.e., each person must use their card/token at every reader they encounter (that is set to "Detect Antipassback"). **Tip:** This helps to protect against unauthorized card usage.

  Note: Antipassback-controlled areas typically require an exit reader on each door.

  Antipassback operation can be customized on an area-by-area basis. For details, refer to "Antipassback" under "Areas and Related Settings".

## Configuration ⇨Doors ⇨In (or Out) Reader




The antipassback status can be reset for a specific user, or for all users in a specific area (to allow their next entry or exit regardless of their previous APB status). For details, refer to "Resetting Users' Antipassback Status", and/or "Resetting the Antipassback Status for Users in a Specific Area" in the Control & Status Chapter.

## [Card Action]

- **Card Action:** This is an optional feature that sets a reader to enable (enrol) or disable (invalidate) a selected type of cards when accepted by the reader. You can select whether or not the door will also unlock, and other parameters (to follow.)

  Blue Text: With a card-enrolment reader (i.e., "Enable Cards"), you can set whether **expired** and/or "**Enrolment Pending**" cards will be affected (Also see: 'Related Settings', after "Option"--to follow / below). The present selection for this will be shown in blue text. Application Tip: 'Expired' cards also includes cards that had been previously enabled for a set period of time.

  Access vs. Card Action vs. Denied: Valid cards that are not affected by the 'Card Action' will simply be granted access (i.e., the reader will operate like any other reader). This includes cards that are already valid (enrolment reader), and cards other than the selected 'Card Type'. Cards that are NOT authorized for this reader at this time (per user authorities), will be denied access, and the card-action will NOT occur.

- **Card Type:** The type of cards to be affected by an 'enable' or 'disable' card-action.

  **Never:** Normal operation (same as selecting "No Card Action");

  **Escort-Required Users:** Users with "Visitor (Escort Required)" authority (although an escort will not be needed for cards being enabled/disabled);

Tip: To enforce the 'escort' requirement for visitors at an enrolment station, ensure "Unlock Door..." is NOT selected. The visitor can 'badge' once to enable the card initially, and then the visitor and escort can use their cards to gain entry as usual.

**Temporary Users:** All cards that are set with an expiry date;

**All Users:** All cards presented at this reader (with authority for its area).

- **Unlock Door on Card Action:** Whether or not the door will unlock (plus the associated 'access granted' message).

  Note: This setting applies only as part of a 'card action' taking place (i.e., the door always unlocks for cards simply being granted access).

- **Duration:** This determines how long the enabled cards can be used (from the moment they are activated).

  End of Today (Schedule 50): This allows enabling cards for the present day only--while schedule #50 is active ("in window"). If schedule #50 has no times set for the present weekday/date, the action will not occur.

  Note: Schedule #50 must be set up:
  Ref: (My Account) ⇨**Schedules**
  📖 Schedules for User Access and Area Automation

- **Option:** For 'disable' commands, "Duration" changes to "Option":

  Permanent: The cards will be disabled, and NOT set as "Pending Enrolment" (they can be re-enabled only if the account is set to "Ignore Pending Enrolment". (See 'Related Settings', to follow / below.

  Pending Enrolment: The cards will be set to allow future re-enrolment.

  (Permanent or Pending Enrolment) **: Auxiliary Output:** Each time a card is disabled, the auxiliary relay will be triggered. This can be used for a turnstile card-capture application. **Note:** The aux. relay must be set to "Door Opener" mode. The relay duration is set in the same screen.
  Locator (to follow / below):
  🗀Aux In/Out🗀, ⇨Auxiliary Output Relay.

Related Settings:

- Account Information, ⇨Setup🗀, ⇨Card Action **(Ignore Pending Enrolment)**.
  See: Account-Wide Panel Settings.
- Users, ⇨Validation🗀, ⇨**Pending Enrolment**, and **Invalid On**.
  See: Users (Entrants/Panel Users).
- Authorities, ⇨Profile 1-4🗀, ⇨Access🗀, ⇨**Visitor (Escort Required)**
  See: Authorities for Users / Entrants.

## 🗀 Request to Exit 🗀

### Standard

- **Request to Exit Required:** Whether or not the RTE (REX) button on the door-controller module is being used.
- **Log Request to Exit:** Whether or not an activity message is to be recorded each time the RTE button is pressed.
- **Request to Exit Circuit:** This is the type of circuit/wiring used with the RTE (REX) circuit for this door.

### Advanced

- **Special Request to Exit Processing on Panel:** This puts the main panel in control of the RTE processing (instead of the door controller). This is for 'interlocked' doors equipped with RTE buttons.
- **Do not unlock on Request to Exit (bypass door circuit only):** This is for a monitored door that does not have to be unlocked to exit (avoids false "Forced Entry" alarms).

  Tip: This can also be used with a motion sensor instead of an RTE button.

## 🗀 Alarms 🗀

### Door Held/Forced Setup

- **Processing Required:** Whether or not this door is to be monitored for forced entry and/or being held open too long.
- **Door Held Open Time:** This is the length of time that the door can be held open (for a typical entrant/user) before it considered to be an alarm condition.
- **Challenged/Extended Held Open Time:** This is the length of time that the door can be held open before it considered to be an alarm condition--after access was granted for a user who is set for "Extended Delay/Challenged".

### Held Open Alarm

- **Transmit / Sonalert / Siren:** The area arming levels for which a 'Door Held Open' alarm will be transmitted, and/or cause a local sonalert or siren to be sounded.

### Forced Open Alarm

- **Transmit / Sonalert / Siren:** The area arming levels for which a 'Door Forced Open' alarm will be transmitted, and/or cause a local sonalert or siren to be sounded.

## Aux In/Out

### Auxiliary Input

- **Mode:** This specifies how the auxiliary input on this door-controller module is to be used (none, monitor mag. lock, or as an Exit/RTE (REX) button used to trigger a door opener).
  Converted PDC door controllers do not support an auxiliary input.
- **Auxiliary Input Circuit:** This is the type of circuit/wiring used with the auxiliary input circuit for this door.

### MagLock Alarm

- **Transmit / Sonalert / Siren:** The area arming levels for which a 'Mag Lock Bond Sense' alarm will be transmitted, and/or cause a local sonalert or siren to be sounded.

### Auxiliary Output Relay

- **Mode:** This specifies how the aux. output relay on the door-controller module is to be used (signal Door Held Open and Forced Entries, or to trigger an automatic door opener).

  Note: The "Door Opener" setting can alternatively be used with 'Card Disable' applications (e.g., turnstile card capture).
  Locator (previous/above):
  🗀In Reader🗀 (or out reader),
  ⇨[Card Action], ⇨(Card Action=Disable Cards; **Option=**... : Auxiliary Output).
- **Time:** This is length of time that the auxiliary relay on the door-controller module will remain energized each time it is triggered.

## Interlock

- **Interlock Required / With / Delay:** With "Interlock Required", all users will be denied access until all of the (up to 3) other doors selected here have been closed (and relocked) for the selected "Delay" time-period.

  **Tip:** This allows limiting the number of persons who can enter in close proximity, and/or the speed at which persons can enter a specific area.

## Special

- **Detect Wandering Patient:** Select this for an exterior door, or other area of concern where unauthorized (and/or infirm) patients are to be detected.

  With this application, user 'access tokens' will typically be a wireless wristband (with appropriate detection in the door frame).

  When a 'wandering patient' approaches, an alarm will be triggered, and the door can optionally lock as they approach (see next setting). As well, hospital staff can be given the authority to cancel the alarm by presenting their (applicable/compatible) token at this door.

  To assign 'wandering patient' status, or provide the authority to reset associated door alarms, refer to the "Special Attributes" selections under "Authorities for Users/Entrants".
- **Lock Door on wandering patient:** With the "Detect Wandering Patient" selection, this causes the door to lock when a 'Wandering Patient' is detected. (See the preceding setting, notes, and references.)
- **In/Out Station:** This applies to a reader being used to log cardholder arrivals and departures (e.g., a time-clock application).

  With this feature, the reader will not be associated with an access-controlled door.
- **Turnstile:** Select this for a turnstile that is being used with anti-passback and 'escort-required' users. (APB will be ignored for the escort--allowing them to badge again to gain entry.)

  Related: • In Reader🗀 ⇨**"Detect Antipassback"**, previous/above; • Account Information ⇨Setup🗀 ⇨**"Escort-Required Mode"**; • Authorities ⇨**"Escort Privilege"**, and "**Visitor (Escort Required)**".

# Elevators (Lifts) and Associated Readers

If you change any value for an elevator/lift, this will cause that device to be reset to its default / scheduled state (this allows configuration updates to be managed properly). To check or re-set status aspects, refer to the "Elevator" status/control topic.

## Introducing Access-Controlled Elevators

With access-controlled elevators, floor call-buttons are disabled until an authorized person presents their access card. When the card is presented, the specific floors for that person will become available.

Each system can include up to **32** elevators, and a total of up to **124** access-controlled floors.

Exception: The elevator capacity is shared with doors (max. 32 combined). Doors also share the elevator numbering (and panel memory space), and will be listed along with the doors (editable under "Door" only).

Tip: You can define elevators at the end of the list, or click **[Filter]** on the toolbar to show only the numbers associated with elevators.

**Panel/Firmware Revision:** Support for elevators and controlled floor-access requires V3.0 panel firmware. **Recommended:** ≥**V3.2** panel firmware, and ≥**V1.5** elevator controller firmware.

Feature-Set and Licensing: Support for elevators requires a 'feature-set' selection of **5** or higher (via Enterprise software licensing).

For details, refer to "Account-Wide Panel Settings", and "Software Activation and Licensing".

Floor Wiring and Set-Up: Floor relays must be wired in the same relative order for all elevators, and then defined in the same order (such as lowest to highest). To define system floors, refer to the floor configuration topic (to follow).

The access-requirements for each elevator reader can be configured to meet your specific requirements. As well, many items can be set to a rotating schedule, allowing different parameters to be in effect after-hours.

For details on setting up the card/token format, refer to "System Card-Access Settings".

Wiegand-output reader keypads are supported for Card+PIN (and PIN-Only) entry modes and signalling duress. Matrix-style keypads (i.e., that require additional connections) are **not** supported for elevators.

## Accessing the Elevator Configuration Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Elevators** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Elevators**.

(Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Adding an Elevator to the System

(Before adding an elevator, the applicable elevator-controller module should be set up. For details, refer to "Expansion Modules".)

Access "Configuration⇨Elevators" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one door at a time;
Grid View: All defined doors in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this portion of the elevator screen while entering and/or selecting your desired settings.

**Tip:** Start with the 'Standard' tab, and then view any additional topics of interest.

**Tip:** You can copy all settings for an elevator, and paste them into another one: Right-click the 1st one (a blank area if in 'Forms' view), and select **Copy**. Then, select a blank/new elevator from the list, right-click again, and select **Paste**. After 'pasting', change the name and any settings as desired. **Note:** 'Copy' and 'Paste' are also available from the **Edit** menu.

### Viewing or Changing Settings for an Elevator and Its Associated Reader

Access "Configuration⇨Elevators" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired elevator at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid View, scan the list as desired.
**Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this portion of the elevator screen while viewing or changing settings as desired.

### If you Need to Delete an Elevator

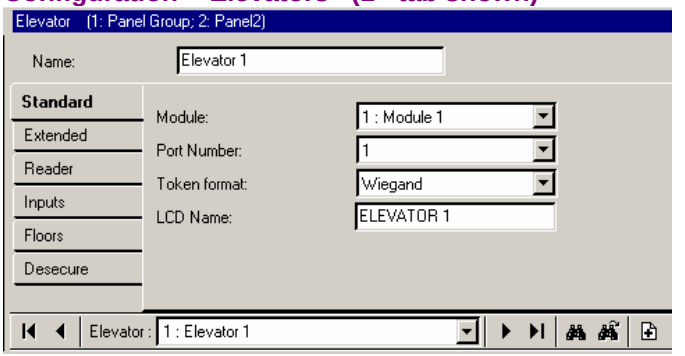
Access "Configuration⇨Elevators" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired door at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired Door in the list, and select **Delete**. When asked to confirm, select **Yes**.)

## Configuration ⇨Elevators (1st tab shown)




## Pick-Lists (Bottom of the Form)

- **Panel Group** & **Panel** references (optional)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".
- **Elevator:** This is where you select an elevator to view or edit. This area shows a reference number assigned by the system, and the name of the elevator, once defined;

  If the Name is Shown as "Door" (and the form is blank): These screens are placeholders for doors (click **[Filter]** on the toolbar to hide door references).

  "Offset" values for each panel determine whether multi-**panel** sites will have consecutive versus repeating elevator/door numbers. For details, refer to the "Display Offsets" value under "System Panels and Displayed Item-Numbers".

## Top of the Form

- **Name:** A suitable name/location for the elevator (lift) cab;

Descriptions of the items on each 'tab' appear on the following pages.

## Standard

- **Module:** The number (from the MODULE screen) for the elevator controller module associated with the elevator cab.
- **Port Number:** Whether this is the 1st or 2nd elevator on the selected elevator-controller module;
- **Token Format:** The card/token format associated with this elevator (lift) cab. Up to two card/token formats are supported for each panel, as defined through the System Access screen.

  "Wiegand" pertains to cards/tokens for readers with Wiegand data-format (Wiegand, Proximity, etc.). Similarly, "Magstripe" pertains to cards for readers with magnetic-stripe output (magstripe, bar-code, etc.).

  For details on setting up the card/token format, refer to "System Card-Access Settings".
- **LCD Name:** A shorter version of the name to be displayed at LCD keypads. This is assigned automatically, and can also be changed if desired (max. 12 chars., plain text).

## Extended

- **Bi-Colour LED Mode:** Select this if the reader at this door has a single bi-colour LED (instead of the two separate LEDs).

  **Note:** Arming-stations are not supported in elevator cabs.
- **Insertion Type Reader:** Ensures the access card is not read more than once when inserted and removed.
- **Floor Button Monitor:** Whether or not other call buttons are to be disabled when a floor is selected (requires call-button-reporting wiring between the elevator unit and our floor relay board).
- **Floor Button Enabled Time:** This is the duration that the allowed floor call-buttons will be available after a valid card is presented at the reader in the elevator (lift) cab.
- **Tamper Circuit:** The type of circuit/wiring associated with the reader tamper input/sensor. ("Not Required" means this connection is not being used/monitored.)

## Reader
### (Elevator (Lift) Reader Settings)

- **In Area:** This is the area associated with this elevator cab.

  Time and attendance reporting requires that all readers used to exit from the "required attendance zone" be set as "Outside".

  This will typically pertain to the interior readers on the perimeter of the facility, and may also include additional readers (such as that allow entry to a cafeteria or fitness room).

  Elevator Area: It is best to set up unique area(s) for use with elevators and the associated access hallways. This allows the authority to control elevators and floors to be separated from other features, and also helps to identify activity/alarm messages pertaining to elevator readers. (The authority to control elevators and floors pertains to the "Door Control" authority selection for the specific area.)

  To create a new area, and set up its operating characteristics, refer to "Areas and Related Settings".

  For details on user authorities, refer to "Authorities for Users/Entrants".

### Card Mode

- **Schedule**, and **In / Out of schedule:** These settings specify the basic method required to satisfy the elevator reader—i.e., present access token and/or enter a PIN at the keypad. If scheduled, different access requirements can be selected for when the schedule is active versus outside of the chosen schedule.

  UID vs. Card Number: The system can be set to require a full card number instead of the user-ID number. (Wherever you see "UID", a card number would have to be entered instead.)
  Related Topic: Account-Wide Panel Settings (look for "**Setup**", and then "**User Logon Mode**").

  Card/PIN: "Card or PIN" means "Card-Only, or User-ID+PIN". With "Card+PIN", the card must be presented (does not allow UID+PIN).

  Manual Disarming: For an armed area that is NOT set to 'Auto Disarm on Valid Token', the user will also have to access the alarm system and disarm the area. For details on the "Auto-Disarm" feature, refer to "Areas and Related Settings".

## Reader Mode

- **Schedule**, and **In / Out of schedule:** These settings specify whether one user can enter, or if a second valid user (or designated 'escort') will be required to enter their Card/PIN as well. If scheduled, different entry requirements can be selected for when the schedule is active versus outside of the chosen schedule.

  With "Dual Custody", two different users must present their card and/or PIN (and neither of them can be set as "Visitor--Escort Required").

  When set to "Escort", a valid 'escort' can also enter on their own by presenting their card/PIN twice. If visitor cards (set to require an escort) are presented, **visitor** escort processing will take over (e.g., with visitor processing, you can set the type of cards escorts can use). Users are defined as escorts (escort privilege) through their authority assignments.

  Related Topics:

  - Authorities, ⇨Profile 1-4🗀, ⇨Access🗀, ⇨**Escort Privilege**, and **Visitor (Escort Required)**. See: Authorities for Users / Entrants.
  - Type of Cards that can Escort Visitors: Under "Account-Wide Panel Settings", look for "Setup🗀", then "**Escort-Required Mode**".
  - Dual custody is also supported pertaining to the disarming of an area. For details, refer to "Areas and Related Settings".

## Lockout

- **Schedule** and **Mode:** These settings specify whether all users are to be denied access either while a selected schedule is active, or outside of the chosen schedule. **Tip:** To disable this feature, select "None" for the schedule.

  Users with 'Master Override' authority can access floors while a 'lockout' is in effect. For details refer to the "Master Override" setting under "Authorities for Users/Entrants".

## Miscellaneous

- **Enable Class Checking:**

  Selected (✓): This selection is **required** if user-access to this reader is to be controlled based on time of day and/or door class. See **[Class Map]** to follow/below. Not Selected: Provides 24-hr access to the user's assigned floors (ignores the users' assigned schedule and door class authorities).

## [Class Map]

- **Schedule, In / Out of schedule**, and **Class A/B/C:** These settings allow restricting access to only the users with specific door-class authority, and/or optionally blocking after-hours access to this specific reader (except users with 'Master Override' authority). If scheduled, a different set of door-class requirements can be selected for when the schedule is active versus outside of the chosen schedule.

  To block after-hours access to this reader, select "Out of Schedule" ⇨None. To remove class restrictions at this reader (without bypassing each user's assigned schedule), select A✓, B✓, C✓ for both "In Schedule" and "Out of Schedule".

  Related Settings:

  - User's door-class authorities and scheduling are set under: Authorities, ⇨Profile 1-4🗀, ⇨**Door Class**🗀. See: Authorities for Users / Entrants.

---

- **Log APB Violation Only:** This will cause APB violations to be recorded, while allowing the person to enter.
- **Detect Antipassback:** This enables / disables the Antipassback feature for this reader.

  Antipassback (APB): A feature that blocks individual cards from being used to:

  **+** Re-enter the same area, or;

  **+** Re-enter the facility from 'outside', and/or;

  **+** (Optional): Enter other areas;

  **...Unless** they are recorded as exiting first--i.e., each person must use their card/token at every reader they encounter (that is set to "Detect Antipassback"). **Tip:** This helps to protect against unauthorized card usage.

  **Notice: Antipassback pertaining to elevator controllers is generally used only in special applications where the floor relays are used to control access to a set of doors instead of an elevator and its associated floor call-buttons.**

  Note: Antipassback-controlled areas typically require an exit reader on each door.

  Antipassback operation can be customized on an area-by-area basis. For details, refer to "Antipassback" under "Areas and Related Settings".

  The antipassback status can be reset for a specific user, or for all users in a specific area (to allow their next entry or exit regardless of their previous APB status). For details, refer to "Resetting Users' Antipassback Status", and/or "Resetting the Antipassback Status for Users in a Specific Area" in the Control & Status Chapter.

## Inputs

- **Fire Required** and **Fire Circuit:** Whether or not the "Fire" input is being used, and the type of circuit/wiring associated with it.
- **Bypass Required** and **Bypass Circuit:** Whether or not the "Bypass" (manual override) input is being used, and the type of circuit/wiring associated with it. (Triggering the bypass input enables the call button for all floors for this elevator.)
- **Panic Required** and **Panic Circuit:** Whether or not the "Panic" input is being used, and the type of circuit/wiring associated with it. This input triggers a "panic"-type of alarm.
- **Floor Button to Enable:** This identifies the action to occur in the event of a fire (enable a floor call-button, all floors, etc.).

## Floors

- This screen lists all defined floors in the system. Under "Control Access To", select the ones that can be accessed from this elevator (lift) cab. (i.e., that are physically connected.)

**Tip:** The floor relay board number/address, and relay numbers are listed for your convenience.

**Attention:** Floors need to have been defined in the same relative order as per the common relay-wiring order for all elevator cabs (such as from lowest to highest). To define system floors, refer to the floor configuration topic (to follow).

# Desecure

## Cab Desecure Schedule

- **Schedule:** This is a schedule to determine the times when an access card will be required to use the floor call-buttons.

  To define a schedule, refer to "Schedules for User Access and Area Automation".

- **Mode:** Whether free access to floors is to be provided inside or outside of schedule chosen above (if applicable).

## Communication Fail

- **Fallback Mode:** Cards to be granted access if the elevator controller module is unable to communicate with the main MONITOR ISM panel database:
  - **None:** No cards/tokens accepted;
  - **Valid Token Format:** All readable cards/tokens accepted;
  - **Valid Site Code:** All cards/tokens with the correct site code will be granted access;
  - **10 Fall-back Users:** Only the users who are assigned as 'FallBack Users'. For details, refer to "Fall-Back Users...".
- **Desecure on Comms Fail:** Whether or not all floor call-buttons are to be enabled whenever the elevator controller or floor relay board has lost communications.
- **Relay Off When Desecure:** This sets the normal physical state of the floor selection relays.

  ☑ = Relays normally powered (held open), and powered down only when access to floors is allowed (and during power failure);

  ☐ = Relays normally de-energized (closed), and energized only when access to floors is allowed. (No floor access during power failure).

  **Wiring:** Relays will typically be wired differently based on this setting:
  ☑ Requires COM – N/**C** wiring;
  ☐ Requires COM – N/**O** wiring.

  Elevator controller floor selection relays must also be wired to the floor call buttons in the same relative order for **all** elevator (lift) cabs (such as from lowest to highest accessed). The floors must then be entered in the same order overall (such as from lowest to highest). To set up floors, refer to the floor configuration topic.

# Floors (Pertaining to Access-Controlled Elevators / Lifts)

If you change the name or other setting for a floor, this will cause that floor to be reset to its default / scheduled state (this allows configuration updates to be managed properly). To check or re-set the floor state (secure vs. desecure), refer to the "Floor" status/control topic.

## Access-Controlled Floors

Systems with elevator controllers can include up to 124 access-controlled floors. These can be in a single building, or the total number of floors between multiple buildings.

Each system supports up to 32 elevator cabs (max. 32 doors plus elevators in total). To set up an elevator and its associated reader, refer to "Elevators (Lifts) and Associated Readers".

**Panel/Firmware Revision:** Support for elevators and controlled floor-access requires V3.0 panel firmware. **Recommended:** ≥**V3.2** panel firmware, and ≥**V1.5** elevator controller firmware.

Feature-Set and Licensing: Support for elevators and floors requires a 'feature-set' selection of **5** or higher (via Enterprise software licensing).

For details, refer to "Account-Wide Panel Settings", and "Software Activation and Licensing".

**Wiring:** Elevator controller floor selection relays must be wired to the floor call buttons in the same relative order for **all** elevator (lift) cabs (such as from lowest to highest accessed). The floors must then be entered here in the same order overall (such as from lowest to highest). For an elevator setting that also affects floor relay wiring, look for the "Relay Off When Desecure" setting under "Elevators (Lifts) and Associated Readers".

## Setting up Floors

Select **Floors** from the MyTools bar, **or** click your site/account button in the tree, and select **Floors**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Now, click within the name field for a blank/grey floor-row in the table, and enter your desired name.

**Attention:** Floors must be entered in the same relative order as per the floor-selection relay wiring for all elevators (such as from lowest to highest).

Note: Forms view does not apply to this topic.

If free access to some floors is desired during specific times, select a schedule at the top of the screen, and then click each floor to be associated with that schedule. For more information, refer to the selection-descriptions for this screen.

## If you Need to Delete a Floor

Before deleting a floor, check to ensure that it is not assigned to any items (elevator controller modules, user authority profiles, or suite-security keypads).

This can be done by viewing the topics for each of these items, and checking for the specific floor. For details, refer to "Authorities for Users/Entrants", "Elevators (Lifts) and Associated Readers", and/or "Suite-Security Keypads and Related Settings".

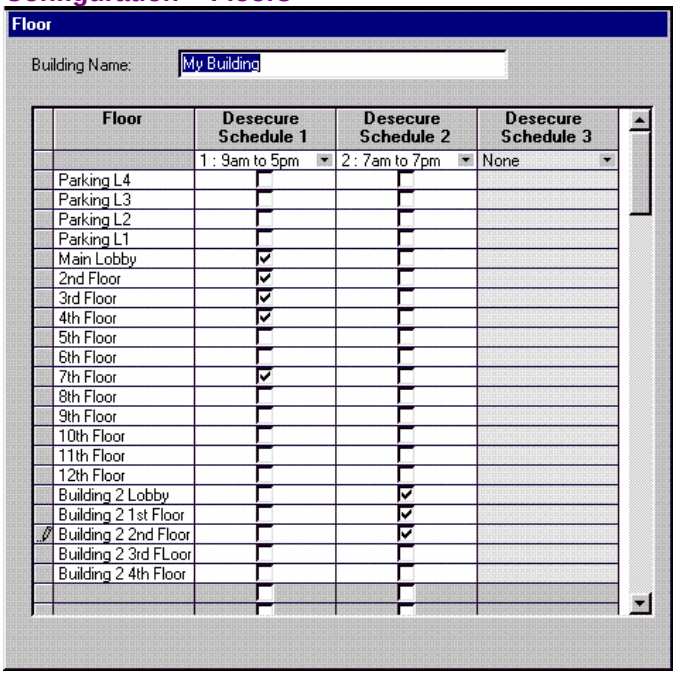
---

Then, select **Floors** from the MyTools bar, **or** click your site/account button in the tree, and select **Floors**.

Multi-**Account** Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

Scroll down to the desired floor, right-click the floor, and select **Delete**. When asked to confirm, select **Yes**.

## Configuration ⇨Floors




- **Building Name:** A suitable description for the building or complex;
- **Floor:** The first column contains a description for each floor. (Click within the name field, and type a suitable name);

  To change the name for a floor, select the present name, and enter the new name. The top cell in this column does not pertain to a floor.
- **Desecure Schedule 1/2/3:** These columns allow selecting up to three schedules during which free access will be provided to any floors selected. (Select a schedule at the top, and then click each floor to be associated with that schedule.)

  Access to all floors from a specific elevator (lift) cab can also be scheduled if desired. For details, refer to "Elevators (Lifts) and Associated Readers".

# Input Points—Monitored Sensors

## Input Points and Related Settings

Input points are the system's way of monitoring devices that detect smoke, motion, door/window openings etc. in each area. The Input Point screen allows fine-tuning basic monitoring characteristics, identifying the area the sensor is in, and whether or not it is on the perimeter of that area.

Emergency Keys: The first 3 inputs on system keypads pertain to the built-in emergency keys rather than external sensors.

Door Controllers and Suite-Security Keypads: These devices have built in dedicated inputs that are set up directly under "**Doors**" or "**Suite Security**".

Many pre-defined input point types are provided, in addition to custom input point types for fine tuning the monitoring characteristics to meet your specific requirements.

Custom point-types also allow setting up:

- "Command Points"--allowing a button or sensor to command a device (e.g., area, door) on any/all panels;
- Extended-delay sensors;
- Vault/Safe input-points;
- Guard-tour points (for guard-tour stations);
- Area arm/disarm keyswitches, and;
- Work-late buttons.

To set up custom input point types, refer to "Input Points—Custom Point Types".

The system also supports 'Equipment' settings which can be thought of as 'pseudo' or 'internal' input points. (For details, refer to the preceding topic.)

## Accessing the Input Point Configuration Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Input Points** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Input Points**.

(Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Adding an Input Point (Monitored Sensor)

Access "Configuration⇨Input Points" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one input/sensor at a time;
Grid View: All monitored sensors in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

**Note:** Input points associated with certain types of modules (HSC, Smart, and RF / wireless) require additional programming locally, through a system keypad. For details, refer to your MONITOR ISM Commissioning Reference Guide.

## Viewing or Changing Settings for an Input Point

Access "Configuration⇨Input Points" as described previously, and use the **Grid** /**Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the desired sensor (input point) at the bottom of the window.

You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid View, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

### If you Need to Delete an Input Point

Before deleting an input point, check to ensure it is not assigned to any programmable outputs.

This can be done by viewing "Configuration⇨Output Points" in '**grid**' view, and checking for the specific input-point in the listing (under "Source" or "Group"). For details, refer to "Programmable Outputs...".

Alternatively, you can issue an 'Output Points' panel configuration report, and check for the specific Input-Point in the listing.

For details, refer to the table of contents for the desired 'Reporting' topic(s).

Access "Configuration⇨Input Points" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

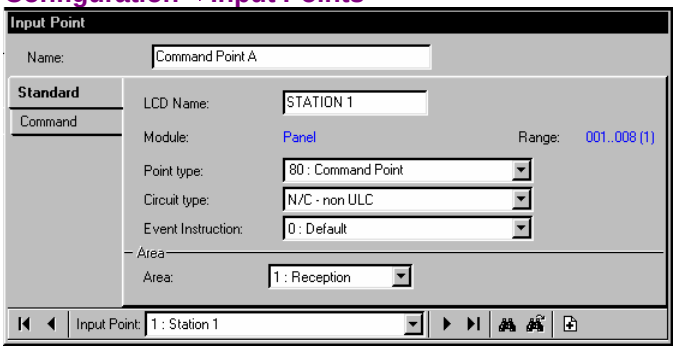
In 'Forms' view, select the desired sensor (input point) at the bottom of the window.

You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid View, right-click the desired item in the list, and select **Delete**. When asked to confirm, select **Yes**.)

## Configuration ⇨Input Points




## Pick-Lists (Bottom of the Form)

-**Panel Group** & **Panel** references (optional; bottom of the form)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".

- **Input Point** (bottom of form)**:** This is where you select an input-point to view or edit. This area shows a reference number assigned by the system, and the name of the selected 'input', once defined;

  The input-point numbers are assigned by the system when a module (POD) that supports input points is set up. The number assigned to each input-point is based on the module installation order, and the number of input-points supported by (reserved for) each module.

  **Tip:** The "Module" and "Range" settings show the device associated with the input-point, and the range of input-points for that device.

  "Offset" values for each panel determine whether multi-**panel** sites will have consecutive versus repeating input-point-numbers. For details, refer to the "Display Offsets" value under "System Panels and Displayed Item-Numbers".

## Top of the Form

- **Name:** A suitable description for the input point indicating its location and/or usage, etc.

( ⇨ )

## Standard

- **LCD Name:** A shorter version of the name to be displayed at LCD keypads. This is assigned automatically, and can also be changed if desired (max. 12 chars., plain text).

  Command Points: For input points set as "Point Type: Custom Type: **Command Point**", the LCD name will be replaced with point-command data, and will not be editable.

- **Module:** This is "Panel" (a system panel) or the module/POD associated with the specific input point number.

---

- **Range:** This is the total range of input point numbers associated with the specific module/POD (as defined by the software when each module is set up).

  **Tip:** The number in brackets, such as "(1)", pertains to the location of the physical input-point connection on the specific module.

- **Point Type:** The type of sensor and/or the type of monitoring to be used with this point (E/E door, PIR, etc.), and to identify the input points that are on the perimeter of an area. The selections include many pre-defined types, plus 'custom types 80-99' that can be set up manually. **Tip:** Pause the mouse cursor over a point-type in the list to view its associated characteristics.

  To set up a garage/extended-delay input, or other custom type of sensor, refer to "Input Points--Custom Point Types".

  EE Door: This pertains to entry/exit doors that are monitored by the system, but **not** electronically controlled for personnel access. To set up an access-controlled door (and its dedicated inputs), refer to "Doors, Readers, and Related Settings".

  Similar to physical items in a system, custom point-types pertain to an individual panel.

- **Circuit Type:** The type of circuit/wiring used with the input point / sensor;

  Fire Panels with Removable Terminal Blocks: Form C -- Dual EOL wiring/supervision is required by ULC (Canada), and recommended for all installations. The actual wiring must also match the selection here.

- **Event Instruction:** This allows assigning instruction text to appear in the comment/resolution screen when an operator is acknowledging an alarm from this sensor (input point);

  **Note:** To be available here, instructions must be defined first:
  Ref: Account Information ⇨**Event Instruction**
  📖 Alarm / Event Instructions

  Instructions Associated with Specific Event Messages: An instruction can also be associated with specific types of event messages (although the instruction selected here will take precedence--where applicable).
  Ref: Account Information ⇨**Event Priority**
  📖 Customizing How Events are Displayed (Event Priority)

### Area

- **Area:** The area that this point is associated with (for doors adjoining two areas, see the next item);

- **Buffer Area** (EE Door points)**:** Where a door adjoins two areas, select the second area here. The system will apply appropriate entry/exit delays whenever only one of the two areas is fully armed (ON).

## Command 🗀

This allows a button or sensor to command an aspect or device for any (or all) panels in an account. This tab appears only if the 'Point Type' (previous/above) is a 'custom type' set as a 'command point'.

Related Settings: Configuration, ⇨**Custom Point Types**.
See: Input Points—Custom Point Type (to follow).

Tip: For additional operating details, refer to "Notes / Attention" at the end of this section.

- **Command Type:** Whether the command is to affect area(s), door(s), or system (panel-wide) aspects.

  **Tip:** Select a command type, and then look under "Command" to see the available choices.

- **Command:** The specific action to occur when the sensor/input is tripped.

  Items separated with a slash (/): This performs a 'toggle' operation between the indicated states each time the sensor/input is tripped.

  (Force and Exit Delays): Exit delays means the affected areas will get an exit delay warning rather than arming immediately. Force (short for 'force arm') means if a point is insecure, the area still arms, and then the point will be reported as 'In Alarm').

  Remote RTE: Momentary unlock using the standard duration.

  Challenged RTE: Momentary unlock using the extended/challenged duration.

  🕮 Pertaining to Bad Card/PIN: Refer to **Bad Card/PIN** 🗀 under "Account-Wide Panel Settings".

  🕮 Pertaining to User Count and Area Activity: Refer to **Counting** 🗀 and **Activity** 🗀 in the 'Area' configuration topic.

  Various/Other: See the command lists at the end of "Maps and Video (Visual Monitoring & Status/Control)".

- **Multiple Panel Command:** Whether or not the command is to affect all panels in the specific account (versus selecting a specific panel).

  Note: For area and door commands, this would typically be used with the "All" selection. (If you select a specific door or area number, the command will affect that area/door **number** for **all** panels).

- **Area / Door:** For area and door commands, select the target item here.

  Without Multiple Panel Command: This lists areas or doors for each panel (in the panel-order as shown in the 'tree').

  With Multiple Panel Command: This lists area/door numbers (or "All"), and will affect all panels in the account.

- **Panel:** For a single-panel command, select the panel here.

---

### Blue Text at the Bottom

This shows a reminder of the your selected command, and the selected panel (if applicable).

**Tip:** If a panel is NOT shown, this means the command will affect all panels (i.e., a 'multi-panel command').

---

### Notes / Attention:

- Multi-panel and cross-panel commands are routed through the Director software. As such, the source and target panels **must** be communicating with the Director software when the input/button is tripped.
- Other than issuing the specific action, command-points are monitored only for 'Tamper' conditions (re: **Transmit**, **Sonalert**, and **Siren**).
- Command Points are fixed as 'Supervisory'.

Related Settings: Configuration, ⇨**Custom Point Types**.
See: Input Points—Custom Point Type (to follow).

# Input Points—Pre-Defined Sensor Types

## Burglary Points:

| Type | Arming Level | Preprocess | Class | By-pass | Chime | Tx Off | Tx Stay | Tx On | SonIrt Off | SonIrt Stay | SonIrt On | Siren Off | Siren Stay | Siren On |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Entry Door | Perimtr | Door (area 1) | Burg | | ✓ | | ✓ | ✓ | | ✓ | ✓ | | ✓ | ✓ |
| Entry Route | 12hr | E/E Route | Burg | ✓ | | | | ✓ | | | ✓ | | | ✓ |
| Perimeter | Perimeter | Immed | Burg | ✓ | ✓ | | ✓ | ✓ | | ✓ | ✓ | | ✓ | ✓ |
| Interior Motion | 12hr | Immed | Burg | ✓ | | | | ✓ | | | ✓ | | | ✓ |
| FAP - Motion | 12hr | FAP | Burg | ✓ | | | | ✓ | | | ✓ | | | ✓ |
| Day Warning | 24hr | Immed | Burg | ✓ | | | | ✓ | ✓ | ✓ | ✓ | | | ✓ |
| 24hr Burglary | 24hr | Immed | Burg | ✓ | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

## Life/Safety Points:

| Type | Arming Level | Preprocess | Class | By-pass | Chime | Tx Off | Tx Stay | Tx On | SonIrt Off | SonIrt Stay | SonIrt On | Siren Off | Siren Stay | Siren On |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Fire - A | 24hr | Immediate | Fire-A | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Fire | 24hr | 15s delay | Fire | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Fire | 24hr | Immediate | Fire | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Hold-up | 24hr | Immediate | holdup | | | ✓ | ✓ | ✓ | | | | | | |
| Aux Alert | 24hr | Immediate | Emerg | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

## Supervisory Points:

| Type | Arming Level | Preprocess | Class | By-pass | Chime | Tx Off | Tx Stay | Tx On | SonIrt Off | SonIrt Stay | SonIrt On | Siren Off | Siren Stay | Siren On |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Supervisory | 24hr | Immediate | Spvsr | ✓ | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | | | |

## Local Points:

| Type | Arming Level | Preprocess | Class | By-pass | Chime | Tx Off | Tx Stay | Tx On | SonIrt Off | SonIrt Stay | SonIrt On | Siren Off | Siren Stay | Siren On |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Local - 24hr | 24hr | Immed | Burg | ✓ | | | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Local-Stay&On | Perimeter | Immed | Burg | ✓ | ✓ | | | | | ✓ | ✓ | | ✓ | ✓ |
| Local-Stay2 & ON | Perimeters | Immed | Burg | ✓ | ✓ | | | | | | ✓ | | | ✓ |
| Local - ON only | 12 hr | Immed | Burg | ✓ | ✓ | | | | | | ✓ | | | ✓ |

**Legend:**

- The 'Class' setting determines the type of alarm message to be transmitted;
- Bypass means whether or not the input point will be bypassable;
- Chime pertains to whether or not the triggering of the input will cause audible tones at keypads in the area (normally used with Entry points/routes to let you know that someone has entered);
- Tx Off, Stay, and On pertain to the arming levels for which activation of the input point will cause an alarm to be transmitted to the monitoring station;
- SonIrt Off, Stay, and On pertain to the arming levels for which activation of the input point will cause keypad 'sonalerts' in the area to be sounded for one second.
- Siren Off, Stay, and On pertain to the arming levels for which activation of the input point will cause siren outputs in the area to be sounded.

# Input Points—Custom Point Types

## Custom Input Point Types

In addition to the extensive list of pre-defined point types, custom input point types can be set up to tailor input-point characteristics to meet your specific needs. Once defined, these are referred to as Point Types 80-99.

Custom point types allow setting up:
• Garage/extended-delay sensors; • Vault/safe inputs; • Command Points; • Activity-monitoring inputs; -- plus special functions including: • Guard tour" checkpoints (stations); • WorkLate" buttons; • Area arm/disarm keyswitch.

As with doors, points, etc., custom point-types pertain to an individual panel, and must be set up for each panel requiring the selected input-monitoring characteristics.

## Accessing the "Point Custom Type" Configuration Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Custom Point Types** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Custom Point Types**.

(Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

## Creating a Custom Point-Type

Access "Configuration⇨Custom Point Types" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one item at a time;
Grid View: All items in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

## Viewing or Changing Settings for a Custom Point-Type

Access "Configuration⇨Custom Point Types" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the custom point-type at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid view, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

## If you Need to Delete a Custom Point Type

Before deleting a custom point type, check to ensure that it is not associated with any input points.

This can be done by viewing the "Input Points" topic in '**grid**' view, and checking the "Point Type" column for the specific custom-type (80-99). For details, refer to "Input Points—Monitored Sensors".

Alternatively, you can issue an Input Point report, and check for the specific custom point-type (80-99) in the listing. For details, refer to the table of contents for the desired 'Reporting' topic(s).

Now, access "Configuration⇨Custom Point Types" as described previously, and use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

In 'Forms' view, select the custom point-type at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid view, right-click the desired item in the list, and select **Delete**. When asked to confirm, select **Yes**.)

## Pick Lists (bottom of the form)

-**Panel Group** & **Panel** references (optional; bottom of the form)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".

- **Custom Point Type** (bottom of form)**:** This is where you select a custom point-type to view or edit. This area shows a reference number assigned by the system, and the description, once defined; **Note:** Similar to physical items in a system, each custom point-type pertains to an individual panel.

## On This Form (Standard 🗀 )

- **Name:** A suitable name indicating the operation or usage for this custom point type;

- **Preprocess:** The duration that the point must REMAIN triggered before an alarm will be audited, or the point type / operation;

Door: The 'Door' selection is normally used with doors that are monitored, but not electronically controlled for personnel access. For access-controlled doors, a dedicated 'Door Contact' input is provided on the door-control module (which is set up through the **Door** screen). As well, door inputs cannot be set for a 24-hr monitoring, and cannot be bypassed (regardless of whether "bypassable" is selected or not).

Extended: This pertains to garage door sensors, and other applications where a longer delay time is desired. With this setting, the area "Extended" delay will apply, and the area can be armed while the input is 'tripped'.

Keyswitch Arming/Disarming: With 'pre-process' set to "Keyswitch...", the "Level" setting provides selections for "Arm" and "Disarm". The chime operation changes as well: If "Chime (√)", **and** the area is set for "Stay on Fail to Exit", the area will be armed to 'Stay' if no users exit after turning the switch (not-Ok to Ok). Conversely, if the chime is not selected, the "Stay on Fail to exit" setting will be ignored (the area will fully arm to 'On'). **Note:** With an arming keyswitch, disarming is typically done through an LCD keypad.

Guard Tour: This pertains to guard-tour checkpoints (stations). For this application:

+ The 'class' should be set as "supervisory";
+ The 'level' will typically be set as "24hr";
+ Any "Transmit" selections will be ignored (guard-tour point activity is referenced locally during the monitoring of a guard-tour).

WorkLate: This pertains to a button that can be pressed (during the pre-arm cycle) to delay the scheduled closing time for the area associated with the input-point. To set the time extension for WorkLate buttons in a specific area, refer to the "Work Late Input Point" setting under "Areas and Related Settings".

Command Point: This allows a button or sensor to command a device associated with: • Any specific panel, • Any area or door number (ID) across all panels, or • All panels/areas/doors of an account.

**Tip:** The actual command is selected when setting up the specific sensor(s)/input-point(s).

Related Topic: Configuration, ⇨Input Points, ⇨**Command**🗀.
See: Input Points—Monitored Sensors (previous).

Activity Monitor: This 'officially' detects activity in an area. For details, refer to **Activity** 🗀 in the 'Area' configuration topic.

- **Level:** The arming levels of the area assigned to the point for which the point will be fully monitored by the system.

  Exception: For keyswitch operation, see the previous "Keyswitch" note.

- **Class:** The basic classification for the point / sensor (this is referenced in messages transmitted to the monitoring station);

  For Command Points: These are fixed as 'Supervisory'. As well, other than issuing the specific action, command-points are monitored only for 'Tamper' conditions.

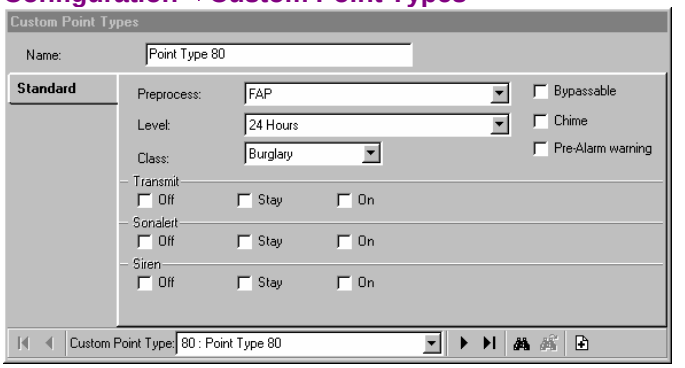
---

- **Bypassable:** Whether or not the point can be bypassed (by a user with 'bypass' authority) should the need arise (e.g., to allow arming an area with a broken window, faulty sensor, etc.).
- **Chime:** Whether or not three short beeps will be signalled at keypads in the area assigned to this point whenever the point is triggered (this can be 'toggled' off at a keypad by pressing *f5*);

  Exception: For keyswitch operation, see the previous "Keyswitch" note.

- **Pre-Alarm Warning:** For associated input-points, alarm transmission (to the central station) will be delayed as per the "Pre-Alarm Delay" setting (for the specific 'area'). During the delay, keypad sonalert(s) will be sounded, giving an authorized user time to "Silence" the alarm at a keypad. (Selecting "Verify User" will cancel the alarm transmission.)

## Configuration ⇨Custom Point Types




For details on setting the "Pre-alarm Delay" time, refer to "Areas and Related Settings".

To assign an area to be monitored by a specific keypad, refer to "Expansion Modules".

For Command Points: This selection does not apply to command points (do not select 'Pre-Alarm Warning' for command points).

### Transmit

- **Off / Stay / On:** The (applicable area's) arming levels for which an alarm message will be transmitted to the monitoring station whenever the point is triggered;

  For Command Points: Other than issuing the specific action, command-points are monitored only for 'Tamper' conditions.

### Sonalert

- **Off / Stay / On:** The (applicable area's) arming levels for which keypad sonalerts will be sounded for 1 second when the point is triggered;

### Siren

- **Off / Stay / On:** The (applicable area's) arming levels for which siren outputs will be sounded when the point is triggered. (The "Siren Time" is set through the **System** screen.)

  For Command Points: Other than issuing the specific action, command-points are monitored only for 'Tamper' conditions. So, the **Transmit**, **Sonalert**, and **Siren** selections will take effect only for tamper conditions.

# Programmable Outputs (Signalling & Device-Switching)

## Output Points and Related Settings

Output points are programmable electronic switches that can be used to signal alarms or control items such as lights, garage doors, etc. The **Output Points** screen allows viewing or changing the characteristics for each of these outputs.

Power: Outputs provide a switching function only (devices must include a suitable power source).

Map/Graphic Annunciator Modules: Outputs on a "Map" module pertain to firing the LEDs on the module itself rather than external devices.

**Exception:** Outputs 1 and 2 on a map module can each fire an LED and are also provided on the board (OP1=+V/High; OP2=0V/Low).

Door Controllers and Suite-Security Keypads: These devices have built in dedicated outputs that are set up directly under "**Doors**" or "**Suite Security**".

## New Features and Complex Equations

Beginning with V4.2, output programming has been greatly enhanced, including:

- Any output function can be set as a positive trigger (Normally 0V/Low; +V/High when triggered), or negative trigger (Normally +V/High; 0V/Low when triggered);
- In addition to steady operation, three On/Off cadence selections are provided;
- Outputs can be triggered by just about any type of event(s)--including the new activity-monitoring and user-counting features.
- Complex equations can be set up using "Boolean" operators (AND, OR, XOR, etc.)

## General Signalling Functions

Outputs can be set to activate whenever a certain type of input is triggered or a specific event occurs. This can be associated with a desired panel ("System"), or a specific "Area", holiday, or device.

## Keypad Function Keys

The function-key feature allows setting up actions to occur when a user presses the "*f*" and a number at an 'LCD keypad'. This pertains to outputs set to "Function Key X".

*f*1-*f*5 are available to all users, while *f*6-*f*9 and *f*0 can be set (on an area-by-area basis) to require a user with "Function Key" authority to log in before the keys will work. For details, see the "Require Function Key PIN" selection under "Areas and Related Settings".

Function key *f*5 is pre-set to toggle the keypad chime feature on and off. It can be programmed for other actions, but is generally not—since the keypad chime feature would be toggled as well.

## The Paging Feature

Outputs 5-8, or 5-8 & 121-128 can be set to signal a numeric pager when triggered by their associated alarm condition.

Outputs 005 - 008: These are used internally by the paging feature (they are not associated with any physical wiring).

The specific alarm/event to be associated with each of the outputs is defined here, while other settings for the paging feature are set through the System Communication screen. For details, refer to "Monitoring, Paging, & Remote Mgt. Settings".

## Accessing the Output Points Configuration Topic

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

Select **Output Points** from the MyTools bar, **or** click your site/account button in the tree, open "Configuration" (**+**), and select **Output Points**. (Under the specific panel group and panel--if listed in the 'tree'.)

Panel Groups and Panels: The 'tree' can be set to show configuration topics in a single list (logical tree view), or on a panel-by-panel basis (best for multi-panel systems). For details, refer to "Other Desktop Choices".

Then, use the **Grid** / **Form** toolbar-button to select your preferred 'view'.

Forms view: Details for one item at a time;
Grid View: All items in a list.

See the item-descriptions for a description of the items on this screen.

## Adding a Programmable Output

Click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from

the list (Forms view: bottom of the window). If no grey ones are listed (or the form is blank), click **Filter** on the toolbar, and re-check the listing.

### Viewing or Changing Settings for a Programmable Output

In 'Forms' view, select the desired 'output' at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid View, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

### If You Need to Delete an Output

In 'Forms' view, select the desired 'output' at the bottom of the window. You can also use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

Then, right-click a blank portion of the form and select **Delete**. When asked to confirm, select **Yes**.

(In Grid View, right-click the desired 'output' in the list, and select **Delete**. When asked to confirm, select **Yes**.

## Pick-Lists (bottom of the form)

-**Panel Group** & **Panel** references (optional)**:** This is where you select a specific panel-group and panel in a multi-panel system where the 'tree' is **not** set to show items on a panel-by-panel basis. For more information on this feature, refer to "Other Desktop Choices".

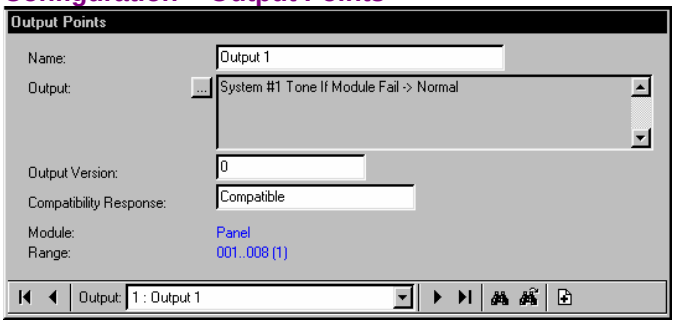
- **Output Point:** This is where you select a device (output point) to view or edit. This area shows a reference number assigned by the system, and the name of the output, once defined;

  Output-point numbers are assigned by the system when a expansion module that supports 'outputs' is set up. The number assigned to each 'output' is based on the module installation order, and the number of 'outputs' supported by (reserved for) each module.

  **Tip:** The "Module" and "Range" areas (blue text) show the device associated with the output-point, and the range of outputs for that device.

  "Offset" values for each panel determine whether multi-**panel** sites will have consecutive versus repeating output-point numbers. For details, refer to the "Display Offsets" value under "System Panels and Displayed Item-Numbers".

## Configuration ⇨Output Points




## On This Form

- **Name:** A suitable name for the device (output point) indicating its location and/or usage, etc.;
- **Output** (and the small **[...]** button)**:** Click the small button to access a second screen for setting up the output. For an existing output, the selected function(s) are shown next to the **[...]** button;

  (See the next screen/section for details.)
- **Output Version:** This shows the panel firmware revision need to support the presently-defined output equation.

  Note: In general, the following items require panel firmware v4.2 or newer: • Multi-segment output equations; • Timed or inverted output actions; • Type E (European) selections; • Cadence functions.
- **Compatibility Response:** This shows whether or not the output equation is compatible with the panel firmware (i.e., after one communications session with the panel).
- **Module:** This is "Panel" (a system panel) or the module associated with the specific output-point number.
- **Range:** This is the total range of output-point numbers associated with the specific module (as defined by the software when each module is set up).

  **Tip:** The number in brackets, such as "(1)", pertains to the location of the physical output connection on the specific module.

## Configuring an Output Point

- Open the Output Point configuration form, and add or select the desired output.
- Click the small **[...]** button to access this screen.
- Click an "**item**" (such as "unassigned") to select a new value. (Additional items will appear as you go along--where applicable).
  **Tip:** See the "Item" descriptions, to follow.
- Use the Up/Down **arrows** to scroll in pop-up lists.
- Right click items to select a command (e.g., Invert, Insert, Remove).

Note: Selections under **[ More >> ]** are for reference/internal use only.

"Items": Event Type, Target Item, Event, ⇨, Output Action

Note: This pertains to an output being triggered by a single condition. For complex equations and 'boolean' operators, see "Multi-Condition Equations", to follow / below.

- **Event Type:** The general type of event that will trigger the output (**System**, **Schedule**, **Holiday**, **Area**, **Point** (sensor), **Output**, **Door**, **Elevator** (lift), **Floor**, **Module**, or **Suite**-security keypad); All function-key selections now appear under "Area".

  **Note:** Selections appear only for device-types that exist in your system. "System" pertains to events associated with the specific main/system panel.
  Exception: **Cadence** selections (at the bottom/end of the list) enable an On/Off pulse-cycle. See "Cadence".

  **Tip:** To invert a function (i.e., have the output trigger whenever something is NOT in effect), right-click the function and select "Toggle Invert".

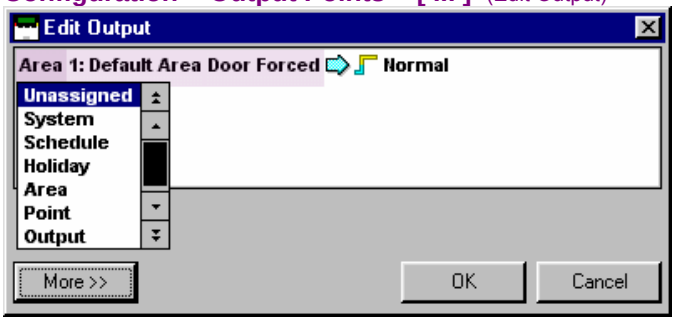
- **Target Item:** This is the specific item associated with the desired event
  (e.g., Area 4, Front Door, Suite 705, Function Key #3, etc.);

  Function Keys: Since function keys 6 – 9 & 0 can be set to require a user-PIN,
  you may wish to reserve these keys for more critical functions.

- **Event:** This is the specific event/condition that will trigger the output;

- **Output Action:** This is how the output will respond when triggered (i.e., for so many seconds, or while the condition remains in effect, etc.).

**Configuration ⇨Output Points ⇨[ ... ]** (Edit Output)




## Event Types and Events:

In general, event selections appear in plain language, and are generally obvious in function. Some notable exceptions and terms are listed here:

- **Activity Detected / Not Detected:** Pertaining to activity detection (≥V4.2) in an area via custom "Activity Monitor" points, and area activity-tracking settings. (Ref: • Configuration ⇨Custom Point Type ⇨"Preprocess = Activity Monitor"; • Configuration ⇨Input Points ⇨"Point Type = MyCustomType"; • Configuration ⇨Areas ⇨ Activity🗀 ).
- **Cadence selections** (System - Cadence...)**:** See the "Cadence..." topic, to follow / below.
- **Counter reaches min (or max):** Pertaining to user counting (≥V4.2).
  (Ref: Configuration ⇨Areas ⇨Counting🗀 ).
- **Digital:** Dial-up modem communications.
- **Failed to Close:** A scheduled area not set to auto-arm was not armed manually at the scheduled time.
- **Force Arm:** Pertaining to arming while a point/sensor is tripped (or tampered).
- **In Window / Out of Window:** Simplistic: Working hours vs. after-hours. Detail: Pertaining to during vs. outside of the active/valid times of a schedule.
- **Pseudo:** Internally-monitored conditions. (Ref: Configuration ⇨System ⇨Equipment).
- **SIP:** Reporting to a central station via IP.
- **SNAPP:** Module communications bus.
- **Version E:** This indicates conditions pertaining to **European** monitoring requirements.

### Output Action:

- "**Normal":** Relay follows the event--Positive trigger (normally 0V/Low, goes +V/High when triggered);
- **Green "+" durations:** Timed--Positive trigger (normally 0V/Low, goes +V/High for selected duration when triggered);
- "**Inverted":** Relay follows the event--Inverted (normally +V/High, goes 0v/Low when triggered);
- **Red "-" durations** (with underscore "_")**:** Timed--Inverted (normally +V/High, goes 0v/Low for selected duration when triggered);
- "**Toggle":** Changes state until next trigger.

For a Point Expansion Module with **Physical Relays:** In the description above, "0V/Low" will pertain to "relay not energized", and "+V/High" will pertain to "relay energized".

Also See: "Cadence (Getting the Output to Pulse On and Off)", and "Equations with Cadence (pulsing)", both to follow / below.

### Commands (when you right-click an item):

- **Toggle Invert:** Inserts (or removes) a "**NOT**" ("Not means whenever the chosen condition is NOT true);
- **Insert Operation:** Inserts a new segment to allow building complex output equations (see below);
- **Remove Operation:** Deletes an inserted segment.

  This appears only if you right-click a bracket or an "And/Or" operator (Boolean).

  **For (deepest nested) brackets, or an "And/Or" Operator inside them:**
  The condition on the right side within the brackets will be removed.

  **For (external) brackets, or an "And/Or" Operator preceding a bracketed function:**
  The entire bracketed function on the right will be removed.

  Also see "**Multi-Condition Equations**", and "Brackets and Equation Processing", to follow / below.

### Cadence (Getting the Output to Pulse On and Off) (≥V4.2):

Three 'Cadence' selections are provided that cause the equation to 'Go False' on a repeating cycle, thus causing the output to pulse. These appear at the end/bottom of the list for the SYSTEM event type. Cadence functions must be inserted using "Insert Operation", and then set as an "**AND**" operation.

For more information, see "**Multi-Condition Equations**", and "**Equations with Cadence (pulsing)**", both to follow / below.

Siren Fire Cadence: Outputs can also be set to follow siren-fire conditions with 1 sec., or 2 sec. on/off pulses. These can be selected directly instead of using 'System - Cadence'. If the siren output itself (OP3 on the main panel) is set to System - **Siren Fire (1 sec)**, this sets 'fire-siren' cadence for **UL** (3 quick pulses separated by 1 second pauses).

### Multi-Condition Equations:

To insert additional conditions into an equation, right-click within a condition/segment on the left of your desired insertion point, and select **Insert Operation**.

e.g., (Condition1 AND (Condition2 OR Condition3)) => OutputAction

Tip: In this case, condition 3 was inserted after right-clicking within condition 2.

Notes: "Condition" represents a complete function (such as "AREA Area1 In Alarm").
An equation can include up to **15** 'conditions'.

**"AND/OR"s** (Boolean Operators for Multi-Condition Equations):

| If "This" **And/Or** "That" is true | | | |
|---|---|---|---|
| Choice | **This** | **That** | **Output Will trigger:** |
| **OR** | ✓<br>×<br>✓ | ×<br>✓<br>✓ | When either condition (**or both**) are true. |
| **AND** | ✓ | ✓ | Only when **both are true**. |
| **NOR** | × | × | Only when neither one is true (i.e., both **NOT** true). |
| **NAND** | ✓<br>×<br>× | ×<br>✓<br>× | When either one or neither of them are true, **but not both**. |
| **XOR** | ✓<br>× | ×<br>✓ | When one or the other is true, **but not both**. |
| **XNOR** | ✓<br>× | ✓<br>× | When both or neither are true, **but not one or the other by itself**. |

Tips: You're likely to use "AND" and "OR" the most.

To invert a selection (i.e., "trigger the output when something is **NOT** true): Right-click the operator, and select **Toggle Invert**. Note: If you end up with two "NOTs" inside the same set of brackets, your equation will be automatically converted to a simpler equivalent.
("NOT A" OR "NOT B" = A NAND B;
"NOT A" AND "NOT B" = A NOR B.)

Converting Your Language into an Operator:

- On/While something is in Effect: Is an "**AND**" operation;
- Except/Unless something is in Effect: Is an "**AND NOT**" operation";

Tip: Use the "Toggle Invert" command to insert the "NOT" function.

## Brackets and Equation Processing

When segments are added (via "Insert Operation"), they appear on the right of the clicked item, and are bracketed together with it. Brackets determine the order in which the equation will be processed, with items inside brackets being evaluated first (deepest nested brackets first, and then moving outward from there). Try inserting two or three dummy/temporary operations, and you'll see how it works.

Example A: With "(Condition1 AND (Condition2 OR Condition3))" the output will trigger only if Condition2 or 3 (or both) is in effect at the same time as Condition1.

Example B: With "((Condition1 OR Condition2) AND (Condition3 OR Condition4))" the output will trigger if at least one item from each side of the "AND" is in effect at the same time.

Example C: If you start with example B, do an "Insert Operation" on Condition1, and set it as an AND function, you will have: "(((Condition1 AND NewCondition) OR Condition2) AND (Condition3 OR Condition4))".

The equation would be evaluated in this order: **1)** C1 AND New; **2)** Result1 OR C2; **3)** C3 OR C4; **4)** Result2 AND Result3.

Note: The deepest-nested brackets are analyzed first.

## Equations with Cadence (pulsing)

To obtain a pulsing output, System - Cadence functions must be "**AND**ed" with the portion of the equation to which they apply. If all conditions of the equation are to cause a pulsing output, the cadence function should be set up first, with everything else appearing within a pair of brackets on the right.

Tip: "**AND**ing" different cadence selections (or none) with the various segments of an otherwise "OR" equation allows a single output to respond differently to different types of events.

For one type of cadence for an entire equation:

- Set up a System - Cadence function **first**;
  Also See: "Cadence (Getting the Output to Pulse On and Off)", previous/above.
- Right-click within it, and select **Add Operation**;
- Set up the second operation as desired, being sure to use an "**AND**" operator;
- Insert any other operations by right-clicking on segments to the right of the cadence function (not within the cadence function itself).

# Programmable Output Functions

📖 • Failed to Close: Area schedule expired, & no one armed the system; • In Window: Schedule active; • Out Window: Schedule expired; • Pseudo: Internally monitored conditions (Ref: Config. ⇨System ⇨Equipment); • Version "E": This indicates conditions pertaining to **European** monitoring requirements (requires Director ≥V4.2).

**System** (events pertaining to the specific main/system panel)**:**

System Tone if Module Fail
Fallback sonalert (at control panel) if Module Bus fails. Provides 1 sec. output every 8 sec. And activates if there is no operational keypad in an area with programmed keypads.

System Ground Start
Ground Start (can only be used on B004 - main panel output 4)

System Fully On
When system is FULLY ON

System Partially On
When system is PARTIALLY ON (Partially or Fully On **for Europe Version**)

System Fully Off
When system is FULLY OFF

System In Alarm
When system is IN ALARM - resets when point(s) restore (includes pseudos & tampers)

System Siren
Follows ALARM & FIRE siren (steady)

System Siren Fire (1 sec.)
Follows ALARM siren - steady for BURG / EMERG and provides 1 sec on/off for FIRE per Keypad Tone. Exception: If selected for the siren output (#3 on main panel), this enables **UL** fire-cadence: ½ sec on/off three times, 1sec pause, and repeats.

System Siren Fire (2 sec.)
Follows ALARM siren - steady for BURG / EMERG and provides 2 sec on/off for FIRE

System Digital Trouble
Phone line trouble (follows report delay or line failure)

System Was In Alarm
System WAS IN ALARM. This is only for input points in alarm e.g. NOT for system trouble (clears when alarmed areas are turned off then back on again)

System Bypassed
When there is a point BYPASSED somewhere in the system

System Fire
When any 'FIRE' point is in alarm

System Hold-Up
When any 'HOLD UP' point is in alarm

System Auxiliary Alert
When any 'Aux Alert' point is in alarm

System Vault
When any 'VAULT / SAFE' type point is in alarm

System Burglary
When any "Burglary' point is in alarm. Delayed burglary for **European Version.**

System Supervisory
When any 'Supervisory' point is in alarm.

System Pseudo
When any 'Pseudo' condition is in effect.

System System Trouble
Pseudo 1 – System Trouble / All type tamper for **European Version**.

System Battery Trouble
Pseudo 2 – Battery Trouble

System AC Failure
Pseudo 3 – AC (Mains) Trouble

System Phone Line Trouble
Pseudo 4 – Phone Trouble

System Report Delay
Pseudo 5 – Report Delay

System Time Lost
Pseudo 6 – Time Lost

System Time Changed
Pseudo 7 – Time Change

System Program Changed
Pseudo 8 – Program Change

System Program Error
Pseudo 9 – Program Error

System Fuse Failure
Pseudo 10 – Fuse Failure

System Pod Trouble
Pseudo 11 – Module Trouble

System Pod Battery Low

Pseudo 12 – Module Battery Low

System Pod Program Edit

Pseudo 13 – Module Program Edit

System Pod Program Error

Pseudo 14 – Module Program Error

System Miscellaneous

Pseudo 15 – Misc. Trouble

System HSC Trouble

Pseudo 16 – HSC Trouble

System Duress PIN

Duress Pin 5 / Duress Pin or PA Alarm for European Version.

System Door Unlocked.

System Door Locked Out

Cards locked out at any door.

System Door Held Open

Doors Held Open

System Door Forced

System Door Tamper

Door contact wiring shorted or cut.

System Door Open

System Door Secure

System Door Sensor Trouble

Doors Sensor Trouble (magnetic bond sensor not ok)

System Global User Lockout

Global lockout per bad card/PIN monitoring.

System Host Computer On-Line

System Host Computer Off-Line

System SIP On-Line

System SIP Off-Line

System Any Point in Tamper

System Any Point in Alarm

System Forced Arm In Effect

System Any Area Failed to Close

System Phone Line Failure

System Local AC Failure

Local AC (mains) failure.

System Version "E" System Tamper

System Tamper – European Version.

System Version "E" System Fault

System Fault – European Version.

System Bypass in Effect when Armed

System Version "E" Fire

System Version "E" Personal Attack

System Version "E" Unconfirmed Alarm

System Version "E" Set/Unset

System Version "E" Freezer/Fire Fault

System Version "E" Bypass in Effect

System Version "E" Confirmed Alarm

Confirmed alarm – European Version (Active when more than one detector is activated during a single armed state).

System Version "E" Siren

System Version "E" Confirmed Alarm Strobe

System Cadence 0.5 Hz (1 sec on, 1 sec off)

System Cadence, 2 second on pulse on the minute

System Cadence, 10 second long pulse on the minute

System - Cadence Selections: These cannot be used on their own (must be ANDed within an equation).

Version "E": Pertains to European monitoring requirements.

### Schedule (Pertaining to a specific schedule)

Schedule In Window (schedule active)

Schedule 15 Minutes Prior to "In Window" (15 minutes before the schedule is active)

Schedule 15 Minutes Prior to "Out Window" (15 minutes before the schedule ends)

Schedule Holiday in Effect (any type)

Schedule "No Access" Holiday in Effect

### Holiday (if a specific Holiday is in effect)

Holiday Holiday in Effect

**Area** (if event occurs in a specific area):

Area Function key #0, #1, ...#9
(Pertains to keypad functions keys)

Area On
When the area is fully armed (ON).

Area Stay 2 (future use)
When the arming level is STAY 2 (future)

Area Stay 1
When the arming level is STAY.

Area Stay (1 or 2)
When armed to STAY. (Stay 2 = future)

Area Off
When the arming level is OFF

Area Not On
When the arming level is "Off" or "Stay".

Area Not Off
When the arming level is "Stay" or "ON".

Area Alarm
When area is in ALARM. Resets when point(s) restore or follows siren timeout (includes pseudos & tampers)

Area Was In Alarm
When area WAS IN ALARM. This is only for input points in alarm e.g. NOT for system trouble (clears when alarmed areas are turned off then back on again)

Area Siren Fire (1 sec.)
Follows ALARM siren - steady for BURG / EMERG and provides 1 sec ON/OFF for FIRE

Area Siren Fire (2 sec.)
Follows ALARM siren - steady for BURG / EMERG and provides 2 sec ON/OFF for FIRE

Area Sonalert (E/E tones on Stay)
Follows sonalert, chime & provides Entry/Exit tones when armed to STAY & ON

Area Sonalert (No E/E tones on Stay)
Follows sonalert, chime & **does not** provide Entry/Exit tones when armed to STAY but provides Entry/Exit tones in ON

Area Extended Delay Entry Tones
Follows Garage/extended delay Entry Tones

Area Bypasses
When any point in this area is BYPASSED

Area Fire
When any 'FIRE' type point in this area is in alarm

Area Hold-Up
When any 'HOLD UP' type point in this area is in alarm

Area Auxiliary Alert
When any 'AUXILIARY ALERT' type point in this area is in alarm.

Area Vault
When any 'VAULT / SAFE' type point is in alarm.

Area Burglary
When any 'BURGLARY' type point in this area is in alarm.

Area Supervisory
When any 'Supervisory' point is in alarm.

Area Pseudo
When any 'Pseudo' condition is in effect.

Area Walk Test
Area is in 'Walk' or 'Hold-up' test.

Area Entry / Exit
When area Entry / Exit delay is in progress – provides a steady output (STAY & ON).

Area Entry
When area Entry delay is in progress - provides a steady output (STAY & ON).

Area Exit
When area Exit delay is in progress - provides a steady output (STAY & ON).

Area Ready
When the area is 'Ready To Arm' - i.e. all points are secure.

Area Open Window
When the active/open window of the area's schedule is in effect.

Area Closing
When the area schedule is expiring in 15 minutes.

Area Door Unlocked

Area Door Locked Out

Area Door Held Open

Area Door Forced

Area Door Tamper
Door Tampers (door contact condition: no EOL resistor etc.)

Area Door Open

Area Door Secure

Area Door Sensor Trouble
Door Sensor Troubles (magnetic bond sensor not ok)

Area Panic Token Detected

| | |
|---|---|
| Area | Counter reaches Min |
| | Considered 'empty'; User Count <= Minimum |
| Area | Counter reaches Max |
| | Considered 'full'; User Count >= Maximum |
| Area | No Detected Activity |
| Area | Activity Detected |
| Area | 15 Min before Scheduled Arm to "On" |
| Area | 15 Min before Scheduled Arm to "Stay" |
| Area | 15 Min before Scheduled Disarm Arm to "Off" |
| Area | Schedule in Window |
| Area | Auto-Command Schedule In Window |
| Area | Failed to Close |
| Area | Any point in tamper in area |
| Area | Armed with Bypasses in Effect |
| Area | Force Armed |
| | Armed with some input points 'tripped'. |
| Area | User Lockout in Effect |
| | Re: Bad Card/PIN monitoring. |
| Area | Wandering Patient Detected |
| Area | Version "E" Siren |
| Area | Version "E" Confirmed Alarm Strobe |
| Area | Version "E" Fire |
| Area | Version "E" Personal Attack |
| Area | Version "E" Unconfirmed Alarm |
| Area | Version "E" Set/Unset |
| Area | Version "E" Freezer/Fire Fault |
| Area | Version "E" Bypass in Effect |
| Area | Version "E" Confirmed Alarm |
| | Confirmed alarm – European Version (Active when more than one detector is activated during a single armed state). |

Version "E": Pertains to European monitoring requirements.

**Point** (if event occurs at a specific Point)**:**

| | |
|---|---|
| Point | Normal (OK) |
| Point | Open (tripped or tampered--any time) |
| Point | Open (disarmed) |
| | Tripped or tampered when area is Off or Stay) |
| Point | Open (armed) |
| | Tripped or tampered when area is ON |
| Point | Alarm |
| | Tripped when area is ON |
| Point | Bypassed |
| Point | Preprocess Delay |
| | PreAlarm Warning is in effect. |
| Point | Tamper |
| Point | Point in Delay |
| | Point is in Delay. Follows a Custom Pt Type that has a time delay. |
| Point | Confirmed point command |
| | Positive Confirmation of Point Command Activation. |

**Output** (pertaining to another output)**:**

| | |
|---|---|
| Output | Real Output is On |
| Output | Equation is TRUE |
| Output | Manual Command in Effect |

**Door** (if event occurs at a specific door)**:**

| | |
|---|---|
| Door | Unlocked |
| Door | Locked Out |
| Door | Held Open |
| Door | Forced |
| Door | Tamper |
| | Door contact circuit cut or shorted. |
| Door | Open |
| Door | Secure |
| Door | Sensor Trouble |
| | Magnetic bond sensor not OK. |
| Door | Blocked by Interlock |
| Door | Wandering Patient Detected |
| Door | Entry Delay in Effect |

**Elevator** (pertaining to a specific elevator/lift cab)**:**

| | |
|---|---|
| Elevator | Offline |
| Elevator | Cab Desecured |
| Elevator | Relay Board(s) Offline |
| Elevator | Fire Input Triggered |
| Elevator | Bypass |
| Elevator | Cab Reader Tamper |
| Elevator | Cab Panic Button |

**Floor** (pertaining to a specific elevator/lift cab)**:**

| | |
|---|---|
| Floor | Floor Desecure |

**Module** (pertaining to an expansion module)**:**

| | |
|---|---|
| Module | On-Line |
| Module | Tamper |
| Module | Comms Trouble (Subst & Comms) |
| | Communication failure or device replaced. |
| Module | Battery Trouble |
| Module | User Logged On (LCD Keypads) |

**Suite** (pertaining to a suite-security keypad)**:**

| | |
|---|---|
| Suite | Alarm |
| Suite | Fire |
| Suite | Tamper |
| Suite | Siren / Sonalert |
| Suite | Communication Trouble |
| Suite | Normal |
| | No Alarm, Fire, Tamper, Siren / Sonalert, or Communications Trouble |
| Suite | Stay |
| Suite | On |
| Suite | Stay or On |

# Installation and Technical Reference

# PC Issues and Software Installation

## Welcome

The topics that follow cover the various aspects of installing and activating a new system. For best results, be sure to scan **all** of the installation topics that follow, and perform the steps in sections that pertain to your type of installation.

## Recommended Computer Specifications

### Operating Systems

Windows XP professional and Windows 2000 are supported.

**Tip:** You may need your Windows CD when setting up a panel connection.

Network Servers: For optimal performance, we recommend running the Director software on **workstation** operating systems only (i.e., NOT on network server operating systems). (This is due to all of the services that will be running on the server PC.)

Windows XP Home: MONITOR ISM Director is NOT intended for use under the "Home" version of Windows XP.

Windows NT, Millenium (ME), 98, and Windows 95 and older: **NOT** supported.

Service Packs: It is always best to stay current on the 'service packs' available for your version of MS Windows, and install them as new ones are released. SP3 is **required** for Windows 2000.

MDAC: Windows 2000 and XP include the Microsoft Universal Data Access component (MDAC).

MSDE Applications: Beginning with V3.30, the MONITOR ISM Director software uses the Microsoft SQL Server Desktop Engine (MSDE), and requires dedicated access to this component. You may not be able to run other software applications that use MSDE on a PC that contains the MONITOR ISM Director database (single-PC or MONITOR ISM Director server PC).

Exception (≥V4.10): If you select SQL Server support during the installation (prev. called "**Open Database**"), MSDE will not be installed. In this case, the database is managed through an MS SQL Server PC, and you will be prompted to provide passwords that allow the Director software to connect with its database.
**Related Topics:** "Advanced Database Features"

IP Connectivity (≥ **V3.30** software and/or panels): Setting up IP connections is documented separately. For requirements pertaining to IP addresses, refer to the installation guide provided with the IP interface (may also be on the Director CD in PDF format).

Client-Server Systems: You can generally mix Windows versions between MONITOR ISM Director client-and-server PCs, with the following exceptions / requirements:

+ Windows **95** cannot be used.
+ It is recommended that you upgrade each PC to the latest Windows "Service Patch" (SP) available.
+ Ensure all Windows settings discussed in the following sections are dealt with.

### PC and Memory (RAM)

Minimal Single-PC System, or a Client Workstation (Windows 2000/XP): PII 300 MHz or equivalent with **256** Mb of RAM (memory).

Server PC and Larger / Busier Systems (Windows 2000/XP): PIII 866 MHz or faster with at least **256** Mb of RAM (memory).

Notes: As with all Windows PCs (especially running multiple programs), a faster processor and additional memory is always better. A PC running only the communications software has the same basic requirements as a client PC.
Year-2000 compliance requires a computer that is also compliant.

### Required Windows / Networking Services (single-PC or client-server)

The following services/protocols must be installed on the ISM Director PC (Director-server PC if applicable). This is typically done by your network administrator or IT department--as applicable:

- Client for Microsoft networks
- Internet Protocol (TCP/IP);
- "File and Printer Sharing for Microsoft networks";

For the indicated operating systems, the following items must be downloaded and installed (set-up is covered later):

**Windows 2000/XP:** Either a network card, or "MS Loopback Adapter" must be installed. As well, "Workstation" and "Server" services must be installed and running (look under:

• Control Panel, ⇨Administrative Tools, ⇨Services; **and/or**:

• Right-click "Network Neighborhood", ⇨Properties, ⇨Services🗀").

### Virus-Checker Software

Be sure to keep the data files (virus definitions) for your virus software up-to-date. If Norton Anti-Virus erroneously reports **"ikernel.exe"** as being infected, download and install the latest data files from http://www.norton.com.

### Video Adapter

Video adapter supporting SVGA resolution (800 x 600) in more than 256 colours (e.g., 'high-colour' or 'true-colour').

**Tip:** XGA resolution (1024 x 768) is recommended.

### Display

Colour SVGA high-quality monitor.

(Recommended for 1024 x 768 resolution: Flat Panel: At least 14"; Tube: At least 17".)

Dual Monitors: If you are using Windows dual-monitor feature, the one on the **right**-hand side must be connected/set-up as monitor **#1**.

### Mouse / Pointing-Device

A mouse (or other type of pointing-device) that is equipped with a scroll-wheel is recommended. This simplifies scrolling within forms and in the on-line help.

### Hard Drive

At least 500 MB of free space while Windows is running is recommended for a full installation and typical database.

Software installation may include: • The Director software; • The card-badging software; • MS Internet Explorer components; • MS SQL-server components.

For demonstration purposes, you can likely install with only 200-250 MB of space available (with Windows running), however this is NOT recommended for a real/working installation.

Note: With larger / busier systems, additional hard drive space will be necessary. (This is unlikely to affect your PC specifications, though, since the smallest hard-drives available today are in the multi-gigabyte range.)

### Software Media / other Drives

CD-ROM drive, double-speed (2X) or higher.

### Communications Ports (Serial / USB)

One free serial **port** (**COMx**) is required for each direct panel connection (and external modem), in addition to any serial ports used by a mouse, or other devices. If your software came with a USB-style 'activation key', one **USB** port will be needed as well (ISM Director **server** PC, if applicable).

**Notes:** Resources for serial ports cannot be 'shared'. In a multi-PC (client-server) system, panel connections can be spread across the available workstations as desired. The activation key works with the provided license-manager software to manage software licensing and maximum system capacities.

### Modems (for remotely managed panels)

Modems that support a connection speed of 38,400 baud are required (e.g., V90 compliant). It is best to use the same brand at the PC and panel(s). A US Robotics Sportster 56K modem is recommended.

The LASAT Safire 560™ Voice Modem has also been tested, and can be used if desired. Exception: This modem cannot be used in conjunction with the Bell 103 (300 baud) support which is built into the panels. Bell 103 connections require a USR Sportster 56K modem at the PC.

Modems for panels must support a standard serial

connection. As well, these modems must support "Auto-Answer", and a connection speed of "38,400 baud"—either through physical switches, or programmable in 'Flash' memory that is not affected by power failure.

Where panels are to dial into the MONITOR ISM Director system to transmit activity messages, each panel requires its own dedicated modem. Otherwise, up to 30 panels can be connected together (via RS485) to share a single modem.

Notes: Modems require a direct/analogue telephone line. Our testing was done using a US Robotics Sportster 56K modem. We provide details on how to set up this model of modem. Other brands and models may require more detailed knowledge of modem configuration.

**To Allow Setting up Panel Modem(s):** Modems to be used with system panels need to be temporarily connected to a computer to enter some 'power-up' settings (as described under "Panel Modem Setup Requirements" in a following section). This requires a PC with a free serial port, plus a suitable modem cable. If the PC has a "serial" mouse, a second port will be needed for the temporary modem connection.

### Printer and Parallel Printer Port

For printing reports, you can use any printer supported by your version of Windows (capable of printing at a suitable speed under MS Windows).

**Note:** The parallel port is also required (ISM Director server PC, if applicable) if your software requires a parallel-style 'activation key' (e.g., ≤**V3.2** software). (The activation key works with the provided license-manager software to manage software licensing and maximum system capacities.)

### System Panels

Main panels must have an up-to-date main board and 'EPROM' chip to be compatible with this software. Existing/older panels must be upgraded or replaced. **Tip:** For details, refer to the instructions provided with your panel upgrade kits.

### For the Photo-Badging Option

The photo-badging option supports these devices:

Video capture device: This feature works with any video or frame-grabber board and supported camera, or any video capture device that is compliant with the "TWAIN" or "Wintab" standard.

Writing Tablet: Any writing tablet that works with your version of Windows can be used to capture signatures. Signatures can also be photographed, or entered using your mouse, but a writing tablet is generally recommended.

Card Printer: Any desired printer can be used that works with your version of MS Windows.

**Installation:** These items must be installed as per the manufacturer's instructions provided with them.

Tip: If you have access to the internet, it is always best to download and install the latest drivers available for your devices.

## Serial Port Installation and Set Up

Each PC to be associated with panel connection(s) must have one free serial port (or a modem) for each panel connection. **Tip:** In a multi-PC (client-server) installation, the panel connections can be spread across multiple PCs as desired.

Windows will normally auto-detect the new serial card/port when you start the computer (after installing the new serial card). Alternatively, you can select **Add New Hardware** from the windows "Control Panel". For details on installing or setting up a serial card that is **not** 'plug-and-play', refer to the documentation provided with the serial card.

**Note:** This software requires serial ports that are NOT sharing computer 'resources'. Check to ensure that all applicable serial ports (COMx) are set to a **unique** interrupt (IRQ) and address (I/O range). This can be done through the Windows 'Control Panel'. (From the Start menu, select **Settings**, **Control Panel**, **System**, and **Device Manager**.)

A bus mouse can be installed to free up an additional serial port if required.

# Windows Settings Required

## Windows Date-Format

For Year-2000 compliance, the short-date format for Windows must be set to include a 4-digit year (yyyy).

**1)** Select **Settings** (from the Start menu), and then **Control Panel**.

**2)** Double-click **Regional Settings**, and then select the **Date** tab.

**3)** In the "Short Date Style" area, enter or select a value that includes yyyy (4 digits) for the year (such as yyyy-MM-dd). Then, click **Apply** to see a sample in the "Short Date Sample" area.

**4)** Click **OK** when finished.

## Windows' Display Settings:

Access the Windows 'Control Panel' by opening the **Start** menu, and selecting **Settings**, and then **Control Panel**. Then, double-click **Display**, select the **Settings** tab, and set these items:

- 1024 x 768 (XGA) resolution if supported, otherwise, 800 x 600 (SVGA).
- High-colour or true-colour if supported, otherwise "256 colours";
- Small fonts (NOT large fonts). **Tip:** Click **[Advanced]** to check the font size.

Click **OK** when finished, and respond appropriately to any additional screens that appear.

## Windows 2000/XP Authorities:

**General Authorities:**

**+** Windows **administrator** authority is needed when installing the MONITOR ISM Director software, or setting up ports and/or modems through the MONITOR ISM Director communications software.

**Settings Required for Client-Server Operation**

**1)** At least one person must have authority to log into the PC being used as the MONITOR ISM Director server (i.e., a PC/domain user). (Someone must be logged into that PC whenever client PCs are to be used.) This step is typically done by your Windows **administrator**.

**2)** The Windows DCOM feature will need to be configured. This is described at the end of the software installation section (since MONITOR ISM Director must be installed first).

### To Allow Database 'Backups' to a Shared Network Drive

With user-level windows/network permissions (e.g., Windows 2000/XP), the "MSSQLServer" service must be set for an **account**-level login (not system-level) which has been given 'write' access to the specific shared folder--plus its parent drive/partition (if formatted as NTFS).

**Director-Server PC** (The PC that includes "...Director-server.exe")**:** From the Windows **[Start]** menu, select **Settings**, ⇨**Control Panel**, ⇨**Administrative Tools**, ⇨**Services**, and double-click **MSSQLServer**. Then, go into **Log On** 🗀, and set-up a desired account-login under "This Account" (i.e., administrator or other user who will have authority to write to the shared network drive).

**PC with the Shared Drive:** Run Windows Explorer, **right**-click the shared drive/folder, and select **Sharing** from the pop-up menu. Then, go to **Security** 🗀, and ensure the specific account has "write" permissions.
Drive Formatted as NTFS: This will be required for the drive/partition as well as the specific folder, as applicable.

### SQL Server Support: User 'Logins' and Passwords:

With Director ≥V4.10, your company's IT department can optionally take charge of the database under SQL Server. (This feature has also been referred to as "**Open Database**".) If you select this feature, you will be asked to enter some new passwords, or optionally enter some custom login information that was set up at the SQL Server PC.

Other advanced database features also require user 'logins' to be defined. For a typical system (i.e., not SQL-server), these must be entered manually.
Related Topics: "**Advanced Database Features**"

---

## Software Installation for a Fresh/New System

**1) Install the new software** from the CD:

- Insert the CD-ROM into the drive, and wait for the 'auto-run' installation screen to appear.
  (If the 'auto-run' screen does not appear, eject & re-insert the CD, or use the Windows Explorer to run the "**Setup.exe**" program file on your CD.)
- Respond to the screens that appear, entering any required information, and making selections that are suitable for your installation.

MS Internet Explorer v5.0 components are required by the database engine. This is included on the CD, and the IE5 installation will start automatically if required. **Note**: If this occurs, **you'll have to run the Director installation again** after IE5 finishes (look for **setup.exe** in the 'root' folder on the CD).

Note: Some stages of the installation may take a few minutes--with only an hour-glass displayed (be sure to let it finish).

If You are Prompted to Overwrite any existing Files: In general, you can select "Yes" to overwrite existing files. **Exception:** If the files are indicated as 'Read-Only', select "No".

**Software Components:** Refer to the descriptions below when deciding which software components to install:

- **Operator Client:** For each PC to be used as a MONITOR ISM Director workstation.
  (For a multi-PC installation, install this on the MONITOR ISM **server** PC as well.)
- **Communication Client:** For each PC to be associated with a panel / modem connection.
  (This may be used on its own, or in conjunction with other software components.)
- **Server:** For the PC that will contain the MONITOR ISM Director database--i.e., the 'server' (or only) PC.

**Tip:** Any or all of the software components can be selected, as applicable (although "Server" will be selected only on **one** PC.)

**2)** Select **[Next]** or **[Finish]** as required to complete the installation.

**3)** Be sure to restart your PC when prompted.
**Tip:** After restarting, a "DB Generator" utility will create a default start-up database for your MONITOR ISM Director software.

**4)** Multi-PC (Client-Server systems): Install the MONITOR ISM Director software on any additional PCs.

Cyclic-ID Codes at each **client** PC: After installing the software at each client workstation, start the software, open **Help**, **About...** and jot down the "Cyclic-ID" code, as this will be needed to 'tell' the server to allow database access for each of these workstations.

This is required for the MONITOR ISM Director software, as well as the Communications software, as applicable.

(To start the software, open the **Start** menu, select **MONITOR ISM Director V4**, followed by **Programs**, and **MONITOR ISM Director**.)

**Tip:** If you prefer, you can cut-and-paste the ID codes into "Notepad" or "MS Word", and use a floppy-disk to transport the file to the server PC (for registration).

Similarly, you'll need to record the "Cyclic-ID" code from the Communications software on each PC to be associated with an alarm panel connection (in addition to the MONITOR ISM Director ID/code, as applicable). To start the Communications software, open the **Start** menu, select **MONITOR ISM Director V4**, followed by **Programs**, and **MONITOR ISM Director-Communication**.

If prompted for the Server Name: Enter or select the name (or IP address) associated with the server PC, and click **OK** (press **F1** if you'd like more information).

If a Device Configuration Screen Appears: If the "Direct-Cable-Connection" or modem that you'll be using has already been set up on the PC, you can select it now (press **F1** if you'd like more information). When finished with this screen, click **OK**. Otherwise, click **Cancel** to close the device-configuration screen.

Then, right-click the LCD/Telephone symbol near the right-hand end of the Windows task-bar, and select **About** from the pop-up menu.

**Note:** A different "Cyclic-ID" code will appear each time you open the "**Help**, **About**" screen. Any of these numbers can be used for the specific software application/PC combination.

**5)** When finished, be sure to place the CD in a safe place.

**Note:** Your software (single PC, or database server) will need to be activated as described under "Software Activation and Licensing" (default licensing is valid for 90 days only).

**Client-server Note:** Once the "Cyclic-ID" has been obtained from all client PCs, this information will need to be entered at the server (to activate the client PCs). For details, refer to "Client Workstation Access and Permissions".

**Panel & Software Revisions:** Beginning with v3.20, the Monitor ISM Director software is compatible with panel firmware v2.0 and higher (although some features will require updating the panel firmware and/or modules).

Associated panels must be the same rev. level, and the Director software must typically be upgraded to the same level or higher.

Notes: Panels ≥**V3.3** are required for IP-related features. ISM V1.x and older panels must be upgraded or replaced (refer to the instructions provided with your panel upgrade kit).

**Client/Server Tip**: When installing a multi-PC system, the software is typically installed first at the MONITOR ISM Director server, and then at the client PCs. Note: Client PCs cannot be used until the server is up and running, and the client PCs have been identified to the server--as per references below. Client-server operation is supported through your 'activation key' and 'license-manager' software.

**Director Server and Workstations:** The Director server PC is not to be confused with your network server PC, or any network-related components, software, or drivers. Director Server: The (networked) PC that includes "...Director-Server.exe"; Director Client-Workstation: Any networked PC that contains the MONITOR ISM Director main program (operator client). **Tip:** With the applicable software installed, the Director server PC can also be used as an operator workstation.

**Activation Key: The activation key provided with the software provides 90 days of operation with standard features. For additional features, client-server operation, or extended duration, you must run the license-manager program (after installing the software).** For details, refer to "Software Activation and Licensing".

"**Cannot Open Database for Photo-badging**": If you see this when starting the Director software, (re)install the Microsoft DAO software from the ISM Director CD (d:\ISM Director Setup\DAO**setup.exe**).

For details on software activation and licensing, setting up a panel connection, and/or setting up a new system, skim forward through the topics that follow, carefully following the steps in any topics that apply to your type of installation.

# Upgrading from an Earlier Version of Software

Attention: Installing V4 software will remove any older **V3.x** versions of the MONITOR ISM Director software. V**4** Director software **cannot** co-exist with **V3.x** Director software on the same PC.

## Typical Steps

**1)** Ensure your database is in sync with your system panel(s), and that you have an up-to-date 'backup' copy of the database.

For details, refer to the on-line help or User's Guide for your present version of software. Refer to: "Alarm Panel Communications and Updates", **or**; "Panel Communications and Updates", **and**; "Backing Up or Restoring the Database".

**Note:** With software ≥**V3.3**, you cannot upgrade directly from a database backup (you must 'restore' 1st if needed, and then upgrade the software).

---

When finished, shut down your MONITOR ISM Director software.

**2)** If upgrading from a **V1.x** system, you'll need to ensure that your main panel is up-to-date as well. **Tip:** This can be done before or after you install the new software. For details, refer to the instructions provided with your panel upgrade kit.)

**3)** If upgrading from V**2**.x Director software, remove that software first (Windows **Start** menu, **Settings**, **Control Panel**, **Add/Remove Programs**). Note: DB 'backups' will be retained.

Tip: V2.x and V**4** **can** be run independently on the same PC, but if you do not require the V2.x software, remove it now.

**4)** **Install the new software** from the CD:

- Insert the CD-ROM into the drive, and wait for the 'auto-run' installation screen to appear.

  (If the 'auto-run' screen does not appear, eject & re-insert the CD, or use the Windows Explorer to run the "**Setup.exe**" program file on your CD-ROM drive.)

- Respond to the screens that appear, entering any required information, and making selections that are suitable for your installation.

  + MS Internet Explorer v5.0 components are required by the database engine. This is included on the CD, and the IE5 installation will start automatically if required. **Note**: If this occurs, **you'll have to run the Director installation again** after IE5 finishes (look for **setup.exe** in the 'root' folder on the CD).
  + Note: Some stages of the installation may take a few minutes--with only an hour-glass displayed (be sure to let it finish).
  + If asked to remove your existing Director software: You must select "Yes" here, or the installation will be aborted. Tip: Your present database will be retained to allow conversion for use with the new software. **V3.2 and Older:** C:\Program Files\MONITOR ISM Director Vx\Data\MONITOR ISM Director.mdb. **V3.3 and Newer:** n/a (you will not be asked for this information)
  + If You are Prompted to Overwrite any existing Files: In general, you can select "Yes" to overwrite existing files. **Exception:** If the files are indicated as 'Read-Only', select "No".

**If You Need to Transfer the Database to a Different PC:** Before starting the software upgrade, skip to the related section (to follow/below).

**Capacity Upgrade:** If you wish to upgrade your system capacities, while retaining the same revision of software, refer to "Software Activation and Licensing".

**Panel & Software Revisions:** Beginning with v3.20, the Monitor ISM Director software is compatible with panel firmware v2.0 and higher (although some features will require updating the panel firmware and/or modules). Associated panels must be the same rev. level, and the Director software must typically be upgraded to the same level or higher.

Notes: Panels ≥**V3.3** are required for IP-related features. Director software version 3.0x and older can be used only with panels of the same basic revision level (e.g., 1.x, 2.x, or 3.0x).

ISM V1.x and older panels must be upgraded or replaced (refer to the instructions provided with your panel upgrade kit).

**Client/Server Tip**: When installing a multi-PC system, the software is typically installed first at the Director-server PC, and then at the client PCs. Director Server: The (networked) PC that includes "...Director-Server.exe"; Note: Client PCs cannot be used until the server is up and running, and the client PCs have been identified to the server--as per references below. Client-server operation is supported through your 'activation key' and 'license-manager' software.

"**Cannot Open Database for Photo-badging**": If you see this when starting the Director software, (re)install the Microsoft DAO software from the ISM Director CD (d:\ISM Director Setup\DAO**setup.exe**).

Software Components: Refer to the descriptions below when deciding which software components to install:

- **Operator Client:** For each PC to be used as a MONITOR ISM Director workstation.
  (For a multi-PC installation, install this on the MONITOR ISM **server** PC as well.)
- **Communication Client:** For each PC to be associated with a panel / modem connection. (This may be used on its own, or in conjunction with other software components.)
- **Server:** For the PC that will contain the MONITOR ISM Director database--i.e., the 'server' (or only) PC.

**Tip:** Any or all of the software components can be selected, as applicable (although "Server" will be selected only on **one** PC.)

**5)** Select **[Next]** or **[Finish]** as required to complete the installation.

**6)** **Convert the previous database** for use with the new software:

**Notice:** If you have only a backup file (.BAK), you must perform a database restoral first.

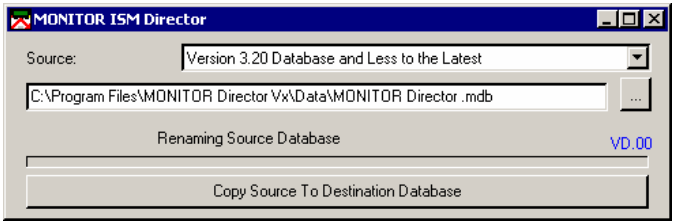
QuickRef: MONITOR ISM Director-Repair.exe ⇨Backup/Restore ⇨**[ Restore Database ]**.
Related Topic: Reverting to (Restoring) a Backup Copy of the MONITOR ISM Director Database

**V1.x Upgrades:** In this case, this step needs to be done twice (once to convert from V1.x to V2.01, and again to convert from V2.01 to the latest version).

- Select **[Yes]** when asked if you wish to convert the database;

  **Tip:** If you wish to start the database conversion utility manually, look for "**MONITOR ISM Director-DB Convert.exe**" in the "Monitor ISM Director Vx" folder (**not** available through the Windows [Start] menu).
- Select the database version that you are upgrading from;
- **For ≤V3.2:** Click **[…]** for the "Source", and locate/select the previous database file (e.g., C:\Program Files\Monitor ISM Director Vx\Data**MONITOR ISM Director.mdb**).
- Click the large **[Copy…]** button at the bottom of the screen, and follow any additional prompts that appear. When this process is finished, click the **X** (top-right corner) to close the database update module.

### MONITOR ISM Director-DB Convert.exe




- **(Source Version):** Select the database version that you are upgrading from;
- **(Source Folder)** and **[...]** (V3.2 and Older)**:** Click the small button to allow selecting the database file that you are upgrading from. (e.g., C:\Program Files\MONITOR ISM Director Vx\Data\MONITOR ISM Director.mdb).

---

**[Advanced]:** This button appears only when upgrading from V1.x, and can typically be ignored. (It allows entering the "UID" for the account / database manually, although this is normally auto-detected.)

- To allow the installation to finish, be sure to restart the PC when asked (and follow any additional prompts that appear).

**7)** Multi-PC (Client-Server systems): Install the software on any additional PCs as required.

Cyclic-ID Codes at each **client** PC: After installing the software at each client workstation, start the software, open **Help**, **About...** and jot down the "Cyclic-ID" code, as this will be needed to 'tell' the server to allow database access for each of these workstations.

This is required for the MONITOR ISM Director software, as well as the Communications software, as applicable.

(To start the software, open the **Start** menu, select **MONITOR ISM Director V4**, followed by **Programs**, and **MONITOR ISM Director**.)

**Tip:** If you prefer, you can cut-and-paste the ID codes into "Notepad" or "MS Word", and use a floppy-disk to transport the file to the server PC (for registration).

Similarly, you'll need to record the "Cyclic-ID" code from the Communications software on each PC to be associated with an alarm panel connection (in addition to the MONITOR ISM Director ID/code, as applicable). To start the Communications software, open the **Start** menu, select **MONITOR ISM Director V4**, followed by

**Programs**, and **MONITOR ISM Director-Communication**.

If prompted for the Server Name: Enter or select the name (or IP address) associated with the server PC, and click **OK** (press **F1** if you'd like more information).

If a Device Configuration Screen Appears: If the "Direct-Cable-Connection" or modem that you'll be using has already been set up on the PC, you can select it now (press **F1** if you'd like more information). When finished with this screen, click **OK**. Otherwise, click **Cancel** to close the device-configuration screen.

Then, right-click the LCD/Telephone symbol near the right-hand end of the Windows task-bar, and select **About** from the pop-up menu.

**Note:** A different "Cyclic-ID" code will appear each time you open the "**Help**, **About**" screen. Any of these numbers can be used for the specific software application/PC combination.

**8)** When finished, be sure to place the CD in a safe place. Reminder: If is best to perform a database backup right away. For details, refer to "Backing Up or Restoring the Database".

Notice: After upgrading, previous database 'backups' may not be supported. Perform a new database backup right away. For details, refer to "Backing Up or Restoring the Database".

**Note:** Your software (single PC, or database server) will need to be activated as described under "Software Activation and Licensing" (default licensing is valid for 90 days only).

**Client-server Note:** Once the "Cyclic-ID" has been obtained from all client PCs, this information will need to be entered at the server (to activate the client PCs). For details, refer to "Client Workstation Access and Permissions".

**9)** If upgrading from **V1.x** software, check to ensure that a "Communications Pool" has been set up for you.
For details, refer to "Communication Pools for System Panels" (or run the "Communications Wizard" from the **Tools** menu).

### Additional Steps/Related Topics

For details on software activation and licensing, setting up a panel connection, and/or setting up a new system, skim forward through the topics that follow, carefully following the steps in any topics that apply to your type of installation.

## If You Need to Transfer the Database to a Different PC

(i.e., changing the MONITOR ISM Director-server PC)

### Typical Steps:

Notice: This pertains to a typical system (i.e., not using SQL server). If switching to a SQL-server-managed installation, the database will be transferred automatically by the installation program (or DB generator).
Related Topics: Advanced Database Features

**If upgrading from V3.2 or older:** Start by transferring a copy of the database (..\Data\MONITOR ISM Director.mdb) to a spare folder on the new PC, and then continue with the software installation (including converting the database).

---

**If upgrading from V3.3 or Newer:** In this case, you need to work from a current 'backup' (.BAK file) of the existing database, which must be 'restored' and then converted using the new software.

**1)** Perform a backup with the existing Director software.
QuickRef: MONITOR ISM Director-Repair.exe ⇨Backup/Restore🗀 ⇨**[ Backup Database ]**.
Related Topic: Backing up or Restoring the Database

**2)** Copy the backup (BAK file) to somewhere on your network, or onto a CD-R, etc., and then transfer it to the new PC (any suitable folder);

**3)** Install the (**new**) Director software on the new PC (including generating a default database);

**4)** Perform a database restoral;
QuickRef: MONITOR ISM Director-Repair.exe ⇨Backup/Restore🗀 ⇨**[ Restore Database ]**.
Related Topic: Reverting to (Restoring) a Backup Copy of the MONITOR ISM Director Database
**Notice:** Do NOT start the Director software yet.

**5)** Convert the restored database for use with the new software.
QuickRef: MONITOR ISM Director-DB Convert.exe. Related Topic: See step **#6** under

"Upgrading from an Earlier Version of Software", previous/above.

---

**If Not Upgrading:** If you are transferring your existing version of MONITOR ISM Director (**v3.3 - v4.0**) to a different PC, perform the following steps:

**1)** Perform a backup with the existing Director software.

QuickRef: MONITOR ISM Director-Repair.exe ⇨Backup/Restore🗀 ⇨**[ Backup Database ]**.
Related Topic: Backing up or Restoring the Database

**2)** Copy the backup (BAK file) to somewhere on your network, or onto a CD-R, etc., and then transfer it to the new PC (any suitable folder);

**3)** Install the Director software on the new PC (including generating a default database);

**4)** A **MONITOR ISM Director.XDF** file was created during the installation. Copy this file to the folder that contains your transferred BAK file.

**Source XDF file location:** (depends on your Windows version)

- Windows 2000: C:\Documents and Settings\All Users\ Application Data\MONITOR ISM Director, **or**; C:\Documents and Settings\All Users**.WINNT**\Application Data\ MONITOR ISM Director
- Windows XP: C:\Documents and Settings\All Users\Application Data\ MONITOR ISM Director, **or**; C:\Documents and Settings\All Users**.Windows**\ Application Data\ MONITOR ISM Director

**5)** Perform a database restoral using the existing Director software;

QuickRef: MONITOR ISM Director-Repair.exe ⇨Backup/Restore🗀 ⇨**[ Restore Database ]**.
Related Topic: Reverting to (Restoring) a Backup Copy of the MONITOR ISM Director Database

**Activation Key and Licensing**

If the database is transferred to a different PC, the 'activation key' (on the back of the PC) must be transferred with it, and the software licensing upgrade must be performed on that PC (after upgrading the software as described previously/above).

For details on upgrading your software licensing, refer to "Software Activation and Licensing".

**If the communications client (modem/panel connection) is being transferred as well:**

- Go into each defined "Communications Pool", and remove all devices (on the left side of the screen), and then delete all devices (on the right side of the screen).
  **Refer to:** Communication Pools for System Panels
- Ensure the new/replacement modems and/or "Direct-cable-connections" have been:
  + Set up under Windows on the new PC, and;
  + Added through the communications software, and;
  + Updated in any applicable "Communication Pools".

  **Refer to:** "New Installation? Try the Wizard!", or "Panel Connection Overview".

A "Could not make call" or "Serial Cable on COMx not Available" error is an indication that the items above have not been dealt with.

## DCOM Setup (Required for Client-Server MONITOR ISM Director Systems):

**For Windows XP** (requires administrator authorities):

Locate / **open** the following items:
Control Panel ⇨ Administrative Tools ⇨ Component Services ⇨
Component Services ("+" or the icon 'till it opens), ⇨ Computers

| **Part 1:** Right-click "My Computer", select [Properties], and set these values:<br>Tip: Leave all other values at the default settings. | **Required for the Director Server**<br>(PC with Director database) | **Required for Workstation PCs** |
|---|---|---|
| **Default Protocols** Tab:<br>Ensure "Connection-Oriented TCP/IP" appears at the top of the list. (Select an item, and click [Move Up] or [Move Down] as necessary.) | **Yes** | **Yes** |
| **Default Properties** tab:<br>• Enable Distributed COM on this computer: (✓)<br>• Default Authentication Level: **None**<br>• Default Impersonation Level: **Identity** | **Yes** | **Yes** |

Note: If required services are not listed, they must be installed first (typically by a network administrator).
When finished, click **OK** as necessary to close the screen(s).

| **Part 2:** Open "My Computer", and "DCOM Config". Then, right-click "ClsSAdmin Object", and select [Properties]:<br>Tip: Leave all other values at the default settings. | **Required for the Director Server**<br>(PC with Director database) | **Required for Workstation PCs** |
|---|---|---|
| **Identity** tab:<br>• The Interactive User: (✓) | **Yes** | × No |
| **Security** tab<br>• NT security/permissions must be set to provide persons and PCs with access to "clsSAdmin Object". The defaults provide access to "Everyone". Change this if desired. | **Yes** | × No |

When finished, click **OK** as necessary to close the screen(s).

**For Windows 2000** (requires administrator authorities)**:**

From the Windows **[Start]** menu, select **Run**, type "**DCOMCNFG**", and press **Enter**.

Tip: If the program is not found, try typing the full path: "C:\winnt\system32**dcomcnfg.exe**".

| Then, set the following values:<br>Tip: Leave all other values at the default settings. | **Required for the Director Server**<br>(PC with Director database) | **Required for Workstation PCs** |
|---|---|---|
| **Default Protocols** Tab:<br>Ensure "Connection-Oriented TCP/IP" appears at the top of the list. (Select an item, and click [Move Up] or [Move Down] as necessary.) | **Yes** | **Yes** |
| **Default Properties** tab**:**<br>• Enable Distributed COM on this computer: (✓)<br>• Default Authentication Level: **None**<br>• Default Impersonation Level: **Identity** | **Yes** | **Yes** |

Note: If required services are not listed, they must be installed first (typically by a network administrator).

| **Applications** Tab:<br>Select "**clsSAdmin Object**" in the list, and click **[Properties]**. Then, select: | **Required for the Director Server**<br>(PC with Director database) | **Required for Workstation PCs** |
|---|---|---|
| Identity tab<br>• The Interactive User: (✓) | **Yes** | × No |
| Security tab<br>• NT security/permissions must be set to provide persons and PCs with access to "clsSAdmin Object". The defaults provide access to "Everyone". Change this if desired. | **Yes** | × No |

**3)** When finished, click **OK** as necessary to close the screen(s).

# Client/Server Start-up Issues

## Client / Server Start-up Requirements

For systems with client-server licensing, the MONITOR ISM Director database can be on one PC, and accessible from multiple client workstations on a network.

**Director Server and Workstations:** The Director server PC and related software is not to be confused with your network server PC, or any network-related components, software, or drivers. Director Server: The (networked) PC that contains the MONITOR ISM Director database, and the "... Director-Server.exe" software module.

**Exception:** For systems managed under SQL server, the Director-server PC contains the "... Director-Server.exe" software module, and the Director database will be stored on the MS SQL server PC;

Director Client-Workstation: Any networked PC running the Director software package (... Director.exe).

**Tip:** With the applicable software installed, the Director server PC can also be used as an operator workstation.

Similarly, the following concepts are also unrelated:

- Starting a PC and performing a Windows/network login;
- Starting the Director software and logging in as a workstation operator.

For client/server operation:

- The PC being used as the MONITOR ISM Director server must be running, and available on (logged onto) the network;

  Note: The person logged in at that PC can be any authorized PC/domain user.
- The MONITOR ISM Director database server program must be running on the server PC.
- The software activation key must be installed on the server PC.

Activation Key: The MONITOR ISM Director software uses a small 'activation key' to manage software licensing and optional features. This device must be plugged onto the PC that contains the software database (≥**V4:** USB connector; ≤**V3.3.2:** Parallel/printer port; **V3.3.3:** Either).

**Note:** Director software ≥**V4 will not start up** if the USB key is missing.

As described in the installation, client-server operation requires some specific Windows settings: DCOM Setup (DCOMCNFG)

**Note:** For an operator workstation to be able access the database, it must have already been identified to the server.

For details, refer to "Client / Server Setup" (in a following topic).

If desired, the MONITOR ISM Director server PC can be used as an operator workstation as well.

## Starting the Database-Server Software (Server PC)

In a single-PC system, the database-server software is started and shut down automatically when necessary. In a multi-PC (client-server) system, proceed as follows:

Go to the specific PC, and check the Windows task bar for an LCD/Folder symbol near the right-hand end. (If present, the server software is already running);

If this symbol is **not** present, use the windows explorer to locate and open "C:\Program Files\MONITOR ISM Director V4", and then run (double-click) the "**MONITOR ISM Director-Server.exe**" program.

**Note:** The MONITOR ISM Director server software will **not** start up if the 'activation key' is not installed on the ISM Director server PC (≥**V4:** USB connector; ≤**V3.3.2:** Parallel/printer port; **V3.3.3:** Either).

To ensure the software started: Re-check the task-bar for the LCD/Folder symbol on the right.

To have the database server start automatically when the server is powered up or restarted, create a 'Shortcut' to the MONITOR ISM Director-Server.exe file, and place it under "C:\Windows\Start Menu\Programs\ **Start-up**" on the server PC.

The "MONITOR ISM Director-Server.exe" file can typically be found under C:\Program Files\MONITOR ISM Director V4. (Right-click the file, select **"Send To"**, and then "**Desktop (Create Shortcut)**". Then, go to the Windows desktop, locate the shortcut, and position and rename it as desired.)

## Shutting Down the Database Server Software

**Attention:** Shutting down the server PC, or the database-server software is NOT recommended while any panel updates are in progress.

As well, always shut down the **Communications** software (LCD/telephone symbol) instead of the server program if the communications software is running.

If you need to shut down the MONITOR ISM Director database server software (server PC):

- Ensure NO panel updates are in progress (via any PC);
- Go to the server PC, and shut down the communications software if it is running on this PC (the server program will be shut down automatically):
  Right-click the LCD/Telephone symbol if present on the right-hand end of the Windows task bar. Then, select **Exit**, and respond with **Yes** when asked to confirm.
- If the communications software is not running on the specific PC, shut down the server software:
  Right-click the LCD/Folder symbol if present on the right-hand end of the Windows task bar. Then, select **Exit**, and respond with **Yes** when asked to confirm.

**Attention:** Shutting down the server PC, or the database-server software will block all operator workstations from accessing the database, and will disable panel communications.

# Software Activation and Licensing

## Software "Activation Key"

System capacities and types of expansion / application modules supported depends on your software licensing, which is managed through a small 'activation key'.

Activation Key: The MONITOR ISM Director software uses a small 'activation key' to manage software licensing and optional features. This device must be plugged onto the PC that contains the software database (≥**V4:** USB connector; ≤**V3.3.2:** Parallel/printer port; **V3.3.3:** Either).

**Note:** Director software ≥**V4 will not start up** if the USB key is missing.

**Your software (activation key) comes pre-enabled to operate for 90 days with standard features.**
**For additional features, client-server operation, or extended duration, you must run the license-manager program.**

## Activating Your Software

The Director USB Security Key or "HASP" must be registered or the Director Program will stop operating!

**Note:** License validations cannot be done over the phone.

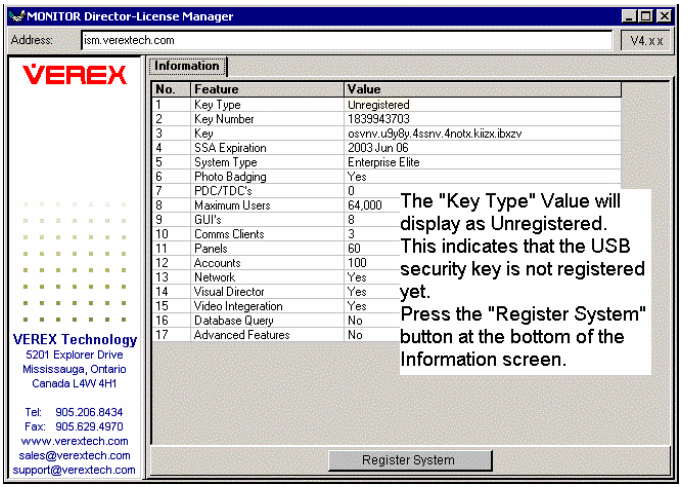
### Dealer Code and Password

Before you begin, you will need a Dealer code and password that must be entered in the Licensing Manager's Registration Information.

The Dealer code and password can be obtained from VEREX Technology by calling +1 905.206.8436.

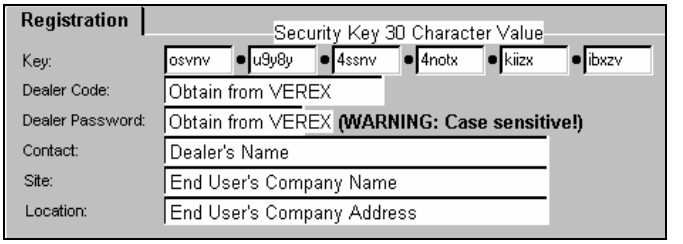
Please perform the following procedures to obtain a new validation key number and register the security key.

- After the Director program has been installed, run the version 4 License Manager program (Director **Server** PC if client-server): **[Start] ➔ Programs ➔ Monitor Director ➔ Monitor Director – License Manager**.
- The "Information" screen will open supplying a list of system features that are enabled or not enabled that were included with the system.

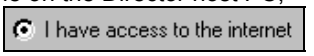



The "Registration" screen will display. Enter

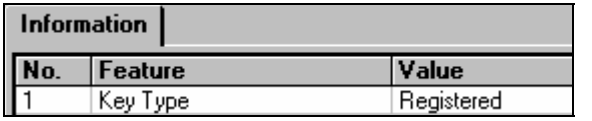
the information beginning with the Dealer Code.




### If you HAVE Access to the Internet on This PC

- After entering the Registration Information and Internet Access is available on the Director host PC, select: 

and press the "Next" button.
- The License Manager will connect with the Licensing Server over the PC's Internet connection, to register the key. After a few minutes, a message should appear that the procedure was successful and your validation Key value will be automatically changed.
- Press the "Done" button at the bottom of this screen.
- The Information screen will display again with the Key Type Feature Value listed as "Registered"
- You can now exit License Mgr. and the Director program will be fully functional.



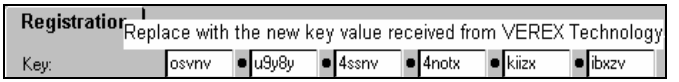

### If you Have Access to the Internet from a Different PC Only

- Select:

and then the "Next" button.
- A message will appear with instructions for connecting to the Internet Server at another PC that does have Internet Access.
- If there is a printer connected to the Director host PC, press the "Print…" button at the bottom of the Dealer Information screen.
- The key value and Dealer Info will print out or, if no printer is available, write the information down.
- Take this information and the Director version 4 installation CD to a computer that does have Internet access.
- Run the CD and run the "Secure License Agent" from the CD's directory.
- Select the "Register" button and enter the key value and Dealer Info. in this Registration screen. Press the "Next" button.
- The License Agent will connect with the Licensing Server over this PC's Internet connection and if successful, a new validation key value should display where the old one was. Record this new key value. Close the Secure License Agent and remove the Director installation CD.
- Take the new key value back to the host Director PC running the License Mgr. and enter the new key value in place of the old one in the Register screen. Press "Next". A success message should appear. Press "Done" and the Information screen will display the Feature Key Type Value as "Registered".
- Close the License Manager and the Director program is now fully functional.

### If You Do NOT Have Access to the Internet

- The Director's installation CD's "Secure License Agent" is not used.
- Print out or print on a fax page the key value and Dealer Info. from the Registration screen in the Licensing Manager on the host Director PC.
- Fax this information along with a return fax number or email address to VEREX Technology (+1 905.629.4970) and a new key value will be forwarded to you.
- Return to the Director's License Manager and enter the new key value in the Registration screen.

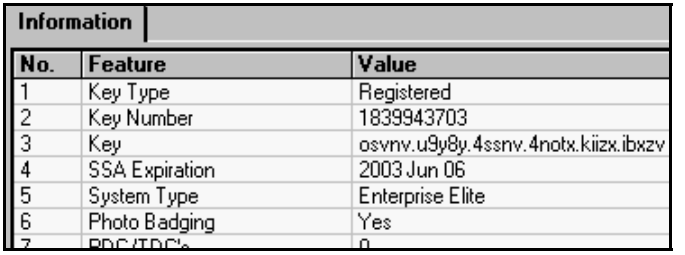



- Press **[ Next ]**. A success message should appear. Press "Done" and the Information screen will display the Feature Key Type Value as "Registered".
- Close the License Manager and the Director program is now fully functional.

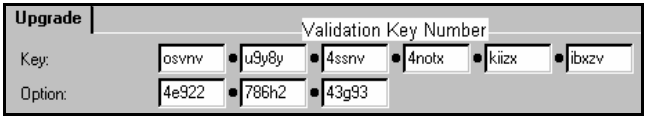
## Upgrading Your Software (Adding Optional Features)

To enable the upgraded functionality, you will need to register your system and obtain a new validation key number. The following registration procedures are available with Director Version 4. NOTE: This process must be repeated for each feature added.

- After the Director program has been installed, run the version 4 License Manager program (Director **Server** PC if client-server):
  **[Start] ➔ Programs ➔ Monitor Director ➔ Monitor Director – License Manager**.
- This Information screen will appear displaying your current system settings.




- Click **[Upgrade System]** at the bottom of this screen.
- The Upgrade screen will now display.
- Enter the 15-character option number provided with your software upgrade, in groups of 5, in the "Option" boxes supplied.



### If you HAVE Access to the Internet on This PC

- If the PC you are working from has Internet Access, select:

- Press the “Next” button at the bottom of this screen. The License Manager will connect with the Licensing Server to register your upgrade. After a few minutes, a message should appear that the procedure was successful and your 30 character, validation Key number will be automatically changed.
- Press the “Done” button at the bottom of this screen.
- The Information screen will display again with your new option enabled.
  You can now exit License Mgr. and operate the Director normally.

### If you Have Access to the Internet from a Different PC Only

- If you do not have access to the Internet on the Director PC, after entering the option number in the License Mgr’s Upgrade screen, select:

and press “Next”.
- Follow the information that is displayed regarding using the “License Agent” on the v4 Director’s installation CD on another PC with Internet access to obtain a validation key number.

### If You Do NOT Have Access to the Internet

- If Internet access is completely unavailable, run the “License Agent” from the Director’s installation CD and select the “Register” button. Fill in all the information fields. The Dealer Code and Password can be obtained from VEREX Technology by calling +1 905.206.8436.Print the information.
- Select the “Upgrade” button and enter the Key and Option number (if necessary, run License Manager on the Director host PC from Start, Programs, Director, to obtain the current validation Key number). Print this information.
- Fax both pages along with a return fax number or email address to VEREX Technology (+1 905.629.4970) and a new validation Key number will be forwarded to you.
- Return to the License Manager on the Director host PC and enter the new validation Key number in the Upgrade screen with the Option number. Press “Next”. A success message should appear. Press “Done” and the Information screen will display the new feature.

# Client Workstation Access and Permissions

Licensing: Client-server operation is optional, and must be selected though the license-manager software. For details on upgrading your licensing, refer to "Software Activation and Licensing" (previous).

## PC Client Access (Allowable Client List)

### Allowable Client List

In a client/server system, client workstations are given access to the central database by identifying them to the server. (After installing the MONITOR ISM Director software at the server and client workstations.)

**Note:** This requires obtaining a "Cyclic-ID" code from the MONITOR ISM Director software running on each client PC (main program, and the communications module).

Communications Client Software: PC client access pertains separately to communications client software, although the concept of permissions does not apply (i.e., you need to obtain the 'Cyclic-ID' code from the communications client software and 'register' it here as an allowed client, but the permission setting is ignored).

**Director Server and Workstations:** The Director server PC is not to be confused with your network server PC, or any network-related components, software, or drivers. Director Server: The (networked) PC that contains the MONITOR ISM Director database, and the database-server component of the Director software;

**Exception:** For systems managed under SQL server, the Director-server PC contains the "... Director-Server.exe" software module, and the Director database will be stored on the MS SQL server PC;

### Obtaining the "Cyclic ID" Codes from Each Client PC

A security code must be obtained from each client PC that is to be given access to the MONITOR ISM Director database.

(This is required for the MONITOR ISM Director software, as well as the Communications software, as applicable.)

After installing the software at each client workstation, start the software, open **Help**, **About...** and jot down the "Cyclic-ID" code, as this will be needed to 'tell' the server to allow database access for each of these workstations. (To start the software, open the **Start** menu, select **MONITOR ISM Director V4**, followed by **Programs**, and **MONITOR ISM Director**.)

**Tip:** If you prefer, you can cut-and-paste the ID codes into "Notepad" or "MS Word", and use a floppy-disk to transport the file to the server PC (for registration).

Similarly, you'll need to record the "Cyclic-ID" code from the Communications software on each PC to be associated with an alarm panel connection (in addition to the MONITOR ISM Director ID/code, as applicable). To start the Communications software, open the **Start** menu, select **MONITOR ISM Director V4**, followed by **Programs**, and **MONITOR ISM Director-Communication**.

If prompted for the Server Name: Enter or select the name (or IP address) associated with the Director-server PC, and click **OK** (press **F1** if you'd like more information).

If a Device Configuration Screen Appears: If the "Direct-Cable-Connection" or modem that you'll be using has already been set up on the PC, you can select it now (press **F1** if you'd like more information). When finished with this screen, click **OK**. Otherwise, click **Cancel** to close the device-configuration screen.

Then, right-click the LCD/Telephone symbol

near the right-hand end of the Windows task-bar, and select **About** from the pop-up menu.

**Note:** A different "Cyclic-ID" code will appear each time you open the "**Help**, **About**" screen. Any of these numbers can be used for the specific software application/PC combination.

### Adding a Client PC to the List

Select **PC Client Access** from your MyTools bar, **or** select **[Management]** in the 'tree', open the **PC Client** branch, and select **PC Client Access**. Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one item at a time;
Grid View: All defined items in a list.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey item from the list (Forms view: bottom of the window).

Now, refer to the selection-descriptions for this screen while entering and/or selecting your desired settings.

### Viewing or Changing the Listed Name or "Cyclic ID" for a Client PC

Select **PC Client Access** from your MyTools bar, **or** select **[Management]** in the 'tree', open the **PC Client** branch, and select **PC Client Access**. Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

(In 'Forms' view, select the desired item at the bottom of the window. **Tip:** You can also use the 'browse' buttons to scan through the listed client PCs, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

(In Grid view, scan the list as desired. **Tip:** You can resize or maximize the window as desired, or use the bottom scroll-bar to view additional columns.)

Then, refer to the selection-descriptions for this screen while viewing or changing settings as desired.

### Testing for Database Access from a Specific PC

Once a client PC has been added here, it should have access to the database as long as the "server" PC is running (and logged onto the network). Simply go to the specific PC, start the MONITOR ISM Director software, and attempt to login.

For client-server login details, refer to the applicable topics under "Welcome to MONITOR ISM Director".

### Blocking Database Access to a Specific Client (Deleting a Client from the List)

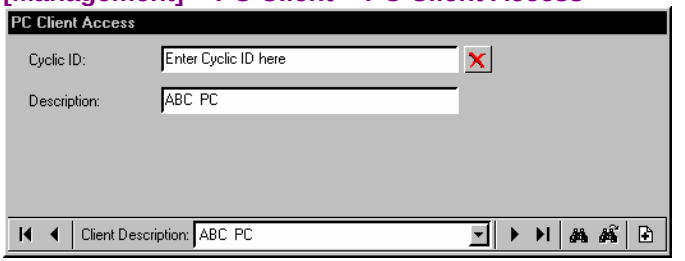
Select **PC Client Access** from your MyTools bar, **or** select **[Management]** in the 'tree', open the **PC Client** branch, and select **PC Client Access**. Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

(In 'Forms' view, select the desired item at the bottom of the window. **Tip:** You can also use the 'browse' buttons to scan through the defined items.

Now right-click the specific client (a blank area if in forms view), and select **Delete**. When asked to confirm, select **Yes**.

( ⇨ )

## [Management] ⇨PC Client ⇨PC Client Access




- **Client Description** (bottom of form)**:** This is where you select a client workstation (or communications client) to view or edit. This area shows the name of each defined client workstation;
- **Cyclic ID:** This is a 16-digit number obtained from each MONITOR ISM Director client PC (under "**About...**" from the **Help** menu on each specific PC).

  **Tip:** To check that you entered a correct value, click **[Save]** on the toolbar, and watch for the symbol to change (see below).

  **Note:** A different number will appear each time you open the "**Help**, **About**" screen. Any of these numbers can be used for the specific PC.
- **Symbol / Icon:** This indicates the type of software associated with each "Cyclic-ID" that you enter. (Click the **Save** button on the toolbar, and watch for the symbol to change.)

  ✖: This indicates an invalid ID-code, or that the other PC is not presently available through the network;
  LCD Keypad Symbol: This indicates a client workstation (MONITOR ISM Director software);
  Communications Symbol: This indicates the communications software (to allow a panel connection).

You can count the number of each type of symbol, and compare this against the number allowed as per your software licensing.

To check the number of software and communications clients allowed, open the **Help** menu, select **[About...]**, and then **[License Info.]**.

---

- **Description:** This is any suitable text to describe the specific workstation.
- **Permissions:** This selects a (previously-defined) permission-set to determine what features will (or will not) be available through this specific client workstation (for operators who also have permission for each specific feature).

  Tip: If no permission-sets are listed, this means they need to be set up. Follow Operator Permissions: Select this if feature-access is to be limited only by the permissions assigned to each operator.

  Communications Client Software: The permission setting does not apply to communications client software (this setting will be ignored).

**Related Topics:**

Operator Permissions

Scheduled Event Filtering for Operators

Setting Up PC Client Permissions (to follow).

# Setting Up PC Client Permissions

## Introduction

'PC client permissions' allow blocking (or granting) access to individual features for all operators at each client workstation.

**Tip:** For each specific item, click once to allow **viewing** only (magnifying glass), or click again to allow viewing and **editing** (pencil). If you click a 3rd time, this will clear the selection.

Communications Client Software: Client permissions do not apply to communications client software.

## Locator:

Select **PC Client Permissions** from your MyTools bar, **or** select **[Management]** in the 'tree', open the **PC Client** branch, and select **PC Client Permissions**. Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Note: Forms view is generally recommended here.

## Setting Up a New Permission-Set

See "Locator" (previous). Then, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternative: You can also select a blank/grey one (or "New Item") in the list (Forms view: bottom of the window).

See the selection-descriptions for this screen while entering and/or selecting your desired settings.

## Viewing or Changing Selections for an Existing Permission-Set

See "Locator" (previous). Then, select the desired item at the bottom of the form.

**Tip:** You can also use the 'browse' buttons to scan through the listed items, or use the 'Find' and 'Find Next' buttons (binoculars) to search by name (or 1st few characters--e.g., nam*).

See the selection-descriptions for this screen while viewing or changing settings as desired.

## If you Need to Delete a Permission-Set

Before attempting to delete a permission-set, you must first check to ensure that it is not assigned to any client PCs (and assign a different one as necessary.)

The simplest way to do this is to:

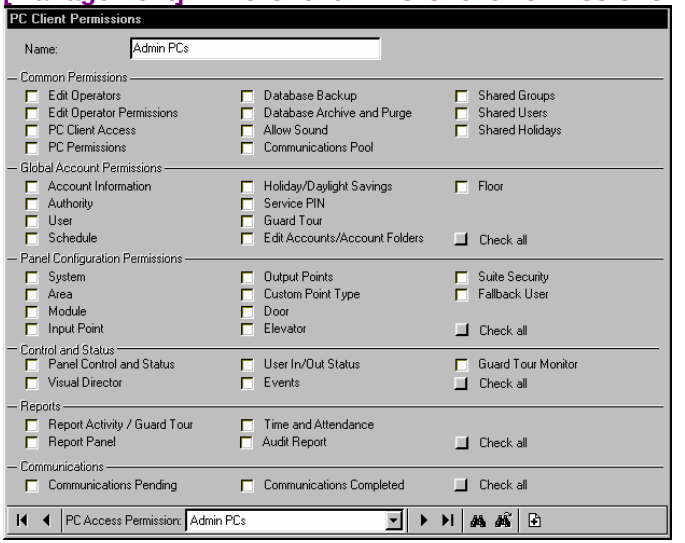
- Select **PC Client Access** from your MyTools bar, **or** select **[Management]** in the 'tree', open the **PC Client** branch, and select **PC Client Access**.
- Switch to 'Grid' view (click **Grid** on the toolbar).
- Scan through the list, checking for the specific permission-set in the list;
- Assign a different permission-set to any operators as required.

Now, select **PC Client Permissions** from your MyTools bar, **or** select **[Management]** in the 'tree', open **PC Client**, and select **PC Client Permissions**. Then, use the **Grid** / **Form** toolbar-button to select your preferred view-mode.

Forms view: Details for one item at a time;
Grid View: All defined items in a list.

In 'Forms' view, select the desired permission-set at the bottom of the window. Then, right-click a blank portion of the screen and select **Delete**. When asked to confirm, select **Yes**.

(In Grid View, right-click the desired permission-set in the list, and select **Delete**. When asked to confirm, select **Yes**.)




**Legend/Reminder:**
Magnifying Glass: Permission to **view** the item only.
Pencil: Permission to view and add/delete/**edit** the item.

## Pick-List (bottom of the form)

- **PC Client Permission:** This is where you select a permission-set to view or edit. This area shows the name of each defined permission-set to use with client software;

## On This Form

- **Name:** A suitable name/description for this permission-set (such as "Admin PCs").

### Common Permissions

- These are permissions pertaining to the entire system (such as editing operators, backing up the database, etc.);

### Global Account Permissions

- Management tasks such as editing users, schedules, holidays, etc., plus working with guard tours.

### Panel Configuration Permissions

- Selections pertaining to setting up areas, and the physical items in a system (sensors, doors, etc.)

### Reports

- Issuing the various types of reports: Activity reports, viewing or printing programmed settings (panel config.), etc.

  Panel Config. Reports: This requires the specific panel configuration permissions as well.

### Communications

- Selections pertaining to panel communications, monitoring, and "Visual Director" (maps and cameras) -- ≥V4.0 software.

# New Installation? Try the Wizard !

Users Shared Across Multiple Accounts: Beginning with Director V4.20, groups of users (and holidays) can be set up once, and then applied to multiple accounts. If your system will include these features, be sure to skip these topics (plus authorities) in the wizard.

Beginning with V4.0 of the MONITOR ISM Director software, you can let a helpful "Wizard" lead you through some common tasks.

Check the new **Tools** menu to see the Wizards that are available. In V4.0 there is one that helps you connect with a panel (Communications Wizard), and one that leads you through setting up a new system (Configuration Wizard).

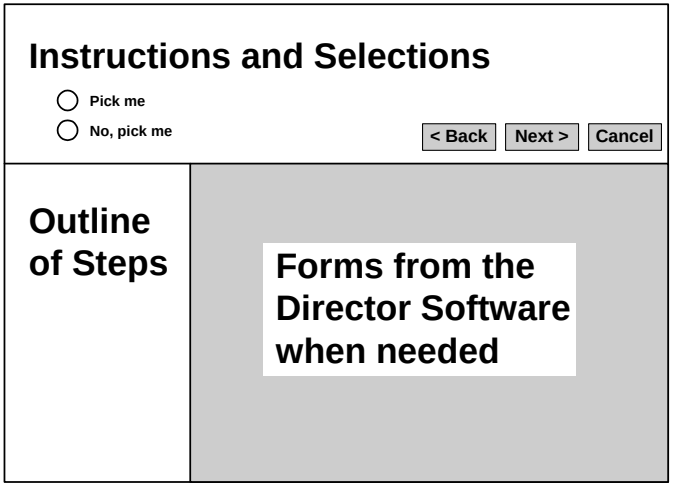
Whenever MONITOR ISM Director screens (forms) are shown in the wizard, you can click the **[Help]** button provided (or press **F1**) to get details on the displayed settings.

**Wizard Permission:** To use the Wizard, your operator permissions must grant "Permission Type: All permissions" for the specific account folder.

**Also See:** "Operator Permissions"

## The Wizard

(Locator: **Tools** menu)



# Panel Connection Overview

Beginning with V4.0 MONITOR ISM Director, you can use the **Communications Wizard** to set up and initiate communications with a panel. For more information, refer to "New Installation? Try the Wizard!"

### 1) Install/Setup Modems and/or Direct-Cable Connections

Ensure the windows "Direct Cable Connections" and/or modems have been set up on each applicable PC.

For a panel that connects directly (through a cable), refer to "PC-to-Panel—Direct Connection". For a dial-up modem connection, refer to "PC and Panels—Modem Connections". **Note:** Modems require additional set-up as described in the indicated section.

### 2) Make Your Software Aware of Modems and Direct-Cable-Connections

Start the communications software, and add the modems and "Direct-Cable-Connections" to be used for panel communications. This software module is called **MONITOR ISM Director-Communications.exe**. This program can be accessed through **Programs** (from the **Start** menu), **or** in the **…\MONITOR ISM Director V4** folder. For details, refer to "Serial Port / Modem Setup (Communications Software)".

**Note**: This step requires administrator authority under Windows 2000 / XP.

### 3) Set Up a "Communications Pool"

Set up a "Communications Pool" for your panel, and assign the connection that was selected in the preceding step. This screen is accessed through the **Communications** section in the 'tree' window.

**Tip:** The very first communications pool for a brand new system is set up automatically. When adding panels, the communications pools must be set up manually. For details, refer to "Communication Pools for System Panels".

**Welcome**

The following is a quick outline of the steps needed to set up a panel connection. For details on each step, refer to the indicated section, and look for headings that apply to your present task, and type of connection.

Browsing for Topics: You can also browse forward through the remaining topics, and follow the sections that pertain to your present task and type of connection.

**IP Network Connections (≥ v3.3)**

IP connections are documented separately. For details, refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

**Panel & Software Revisions:**

Beginning with **V3.20**, the Monitor ISM Director software can connect with panels **V2.0** and higher.

Note: Associated panels must be the same rev. level, and the Director software must typically be upgraded to the same level or higher. Exception: V3.3 panels OK with V3.20 software (if IP-related features are not needed).

### 4) Enter Your "Connection Configuration" Settings (Panel Group screen)

Enter the "Connection Configuration" settings for your panel (including selecting the 'Communications Pool' that was set up in the previous step. These settings can be found at the bottom of the form after selecting your "**Panel Group**" in the tree. (Logical Tree View must not be in effect.)

**Tip:** For a brand new system, these values are set up automatically. (Exception: The phone number for a dial-up connection must be entered manually). When adding panels, these items must be set manually.

For details, refer to "Panels, Panel Groups, and Related Settings".

### 5) Enter Your "Host Connection" Settings (System Configuration screen)

Set up your "Host Connection" settings (at the bottom of the '**System Communication**' screen). This will include the panel serial number, a non-zero "Panel Code", and other desired settings.

For details, refer to "Monitoring, Paging, & Remote Mgt. Settings".

### 6) Panel Settings (Account Information)

Select these items under Account Information:
• Account Type; • Panel Operating Mode; • Panel Version; • Feature Set.

For details, refer to "Account-Wide Panel Settings".

Actual Panel Version: The software will recognize this during the 1st communication attempt, and display it in the "System" configuration screen. Related topics:
+ "System Settings for each Panel".
+ "Panel Communications and Updates".

Feature Set: This determines your system capacities. The maximum supported feature-set is based on your software licensing. Related topics:
+ "System Capacities".
+ "Software Activation and Licensing".

---

**See Also (Related Topics):**

Setting up a New System (Commissioning)

For a brand new system, you'll need to enter items, and configure the system for desired operation.

For details, refer to "Setting up a New System (Commissioning)".

Update or Synchronize Panel(s) (Panel Communications Session)

Once the connection has been configured, you can set up a 'panel communications session' to transfer settings or synchronize your software with specific panel(s).

For details, refer to "Panel Communications and Updates".

Make a 'Backup' Copy of Your Database (to protect against data loss)

To protect against data loss (i.e., having to re-enter information), you'll need to make a 'backup' copy of your database.

For details, refer to "Backing up or Restoring the Database".

# IP Connectivity

Beginning with version **3.30**, the MONITOR ISM Director software allows connecting to a panel through an IP connection (LAN/WAN), and/or reporting to a central monitoring facility through an IP connection (SIP reporting).

The PC-to-panel connection via IP does not require any specific revision of panel firmware. The SIP reporting feature requires v3.30 panel firmware or higher.

IP connections include an IP interface board that must be properly set up for use with the MONITOR ISM Director system.

**All details on setting up an IP connection are documented separately. For full details, refer to the instruction manual included with your IP interface board.**

Tip: This may also be available on the Director CD as a printable/viewable 'PDF' file.

**Panel & Software Revisions:** Monitor ISM Director software **V3.2** and higher can connect with panels **V2.0** and higher.

Associated panels must be the same rev. level, and the Director software must typically be upgraded to the same level or higher.

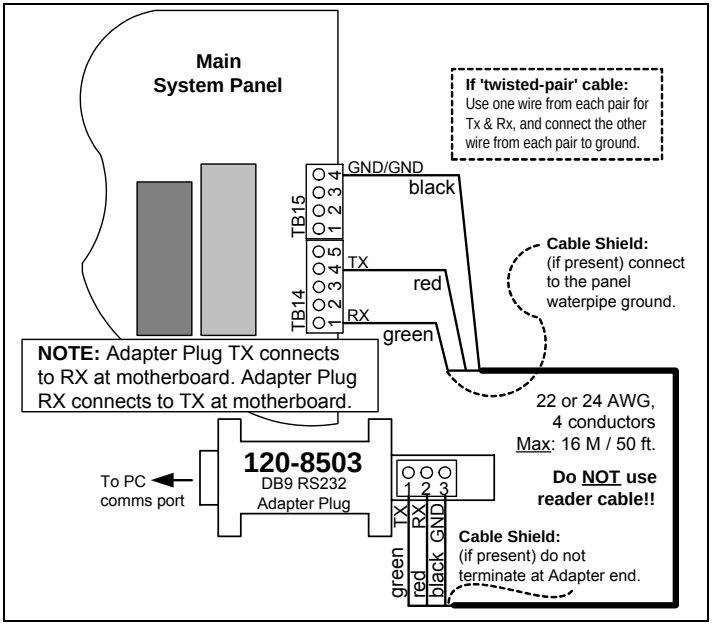
Exception: V3.3 panels OK with V3.20 software (if IP-related features are not needed).

# PC-to-Panel—Direct Connection

**Panel & Software Revisions:** Monitor ISM Director software **V3.2** and higher can connect with panels **V2.0** and higher. Associated panels must be the same rev. level, and the Director software must typically be upgraded to the same level or higher. Exception: V3.3 panels OK with V3.20 software for this type of connection (i.e., non-IP).

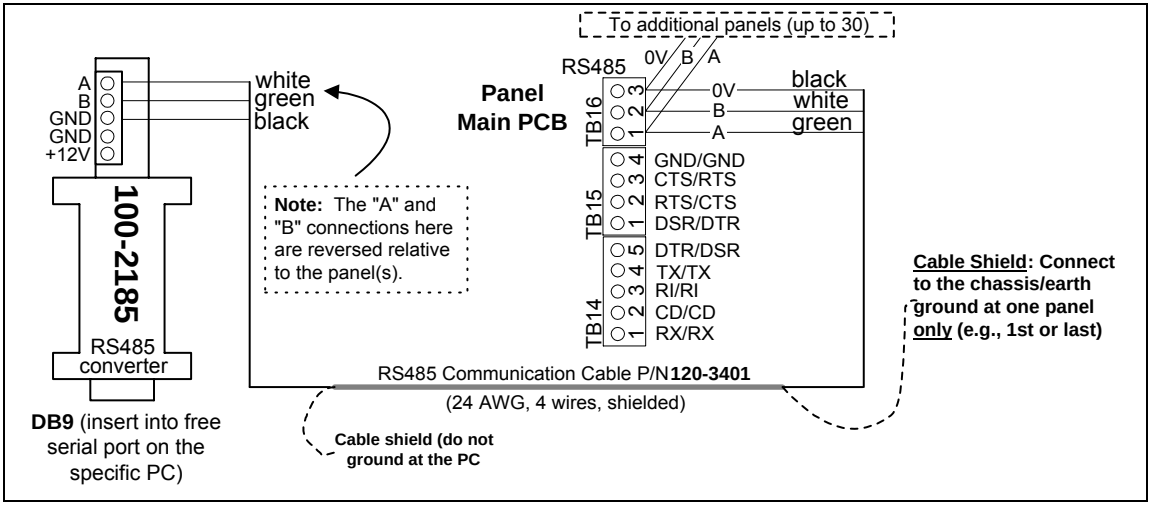
## Single-Panel, Close to the PC (RS-232 / Connection Kit)

The MONITOR ISM Director software includes a connection kit that simplifies the PC-to-alarm-panel connection for a single panel (direct, RS-232 connection). Refer to the illustration to complete the panel connection.




## Multi-Panel, and/or far From the PC (RS-485 Adapter)

For longer distances, and/or multiple panels per connection, the MONITOR ISM RS485 converter is required. Refer to the illustration for connection details.




**Tip:** An RS485 connection supports distances of at least 300 m (1000 feet) in total length.

## Windows Direct-Cable-Connection Setup

To allow connecting to panels through a physical cable, you must ensure that support for this has been installed and set up through your MS Windows.

**(Windows 2000/XP):**

Note: Windows 2000 and XP treat a 'direct-cable-connection' the same as a modem.

**1)** (Shut down MONITOR ISM Director if applicable).

**2)** From the Windows **Start** Menu, select **Settings**, **Control Panel**, and **Phone and Modem Options**.

**3)** Select the "Modems" tab, and click **[Add]**.

**4)** Select "Do not detect...", and click **[Next]**.

**5)** Under "Standard Modem Types", select "Communications Cable between two computers", and click **[Next]**.

**6)** Select the serial port (COMx) that the cable will be using, and click **[Next]**.

**7)** Click **[Finish]**.

**8)** In the next screen, click **[OK]** to close the screen. Note: The name of the direct-cable-connection will be set as "Communications Cable between two computers".

**Also See (Related Topics):**

"New Installation? Try the Wizard!"
"Panel Connection Overview"
"Setting Up a New System (Commissioning)"
"Panel Communications and Updates

# PC and Panels—Modem Connections

**Tip:** For details on the types of modems supported, refer to "PC Issues and Software Installation".

Note: External modems pertain to panel-to-PC communications only. Messages are transmitted to a central monitoring facility through the built in 300 baud modem and/or an IP connection (≥V3.3 panels), or high-security communications--HSC (via Mark7/DVACS service in Canada).

**Panel & Software Revisions:** Monitor ISM Director software ≥**V3.2** can connect with panels ≥**V2.0**.

Associated panels must be the same rev. level, and the Director software must typically be upgraded to the same level or higher. Exception: V3.3 panels OK with V3.20 software for this type of connection (i.e., non-IP).

## PC Modem Installation or Connection

Ensure that any PCs to be used for dial-up panel communications have the required modem(s) available, or install additional modem(s) as necessary. Systems with multiple dial-up panels should generally have at least two modems available (or more as needed, depending on the system communications requirements).

For an external modem (that sits on the PC or desk), connect to an available serial port using a standard serial cable (with the appropriate size 'DB' connector at each 'end').

Notes: A typical cable will be DB9-female to DB25-male (check your PC and modem to verify your requirements). Standard modem cables are available in lengths up to 15 m (50 feet). **Attention:** Do NOT connect using a "null-modem" cable or "file transfer" cable. DB9 to DB25 adapters can be used if needed. (Ensure all 9 pins are connected—some 'mouse' adapters cannot be used).

Once connected to the computer, the modem simply plugs into a standard telephone jack using a telephone extension cable. **Note:** Modems require a direct/analogue telephone line.

## Windows Modem Setup

When a new modem is installed on a Windows PC, the Windows software will normally detect the new device, and lead you through some simple installation steps. An installation CD or diskette may also be provided with the modem.

If a new modem is not recognized, you can go into the windows Control Panel and select "**Add New Hardware**", and follow the prompts that appear. **Note:** Older modems may not meet compatibility requirements for "Plug-and-Play" installation. In this case, you may be able to use an installation diskette provided with the modem (or the modem may need to be upgraded or replaced).

After installing a modem (or if using one that is already present), check to ensure that it's maximum connection speed under MS Windows is set to "38400" or higher:

- From the Windows **Start** menu, select **Settings**, and then **Control Panel**.
- When the 'Control Panel' selections appear, locate and double-click **Modems**.
- Select your modem in the list, and click **Properties**.
- Ensure the "Maximum Speed" is set to 38400 or higher (change this setting if needed).
- Ensure "Only Connect at This Speed" is NOT selected (if present).
- When finished, click **OK**.

**Tip:** Be sure to repeat the preceding steps for any additional modems (on any applicable PCs).

**Note:** The steps described in the next section are **not** required for a modem associated with a MONITOR ISM Director PC (since the settings are handled by the Director software and/or Windows operating system).

# Physical Setup of Panel Modems

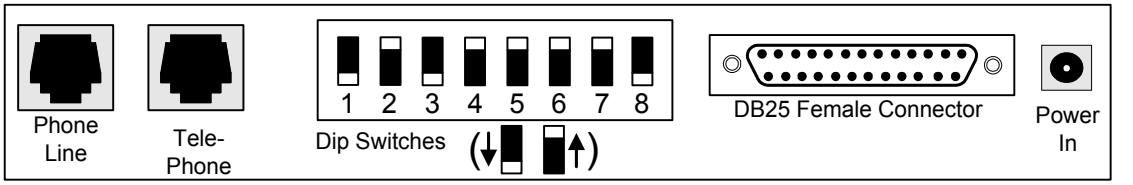
## Panel Modem Set-up Requirements

Modems to be used with MONITOR ISM main panels must first be set up for proper operation. The following switch settings and configuration steps pertain to the recommended modem: US Robotics Sportster (56k / V90).

For modem requirements and recommendations, refer to "Recommended Computer Specifications". If you need to set up a **different** brand of modem, this may require a more detailed knowledge of modem configuration. (You can check the reference data in the following sections, and then refer to your modem documentation for further instructions.)

## Modem Switch Settings (USR Sportster™ 56K)

For an external USR Sportster 56K modem to be used with a system panel, check to ensure the small switches on the rear of the modem are set like this:




**Reference Information: Modem Switches (USR Sportster™ 56K)**

| | |
|---|---|
| Switch 1 (down): | DTR override |
| Switch 2 (up): | Verbal result codes |
| Switch 3 (down): | Display result codes |
| Switch 4 (up): | Display offline commands |
| Switch 5 (up): | Answer on 1st ring |
| Switch 6 (up): | Carrier Detect - Normal |
| Switch 7 (up): | Load NVRAM defaults |
| Switch 8 (down):. | Smart Mode. |

**LASAT Safire 560™ Voice Modem**

The LASAT Safire 560™ Voice Modem has **no** on-board switches.

## Panel Modem Configuration (Samples: USR Sportster™ 56K and LASAT Safire 560™ Voice Modem)

Once the switches are set correctly, you'll need to temporarily connect the modem to a PC, and load some specific settings into the modem's memory. This can be done with the "HyperTerminal" program that is included with MS Windows (or any other "terminal-emulation" program that you may be familiar with):

**Note:** Ensure you have the specific modem with you, and a suitable modem cable for connecting it to the PC. (This must be a standard modem cable, NOT a 'laplink-style' cable, "null-modem" cable, or any other type of file-transfer cable.)

**1)** Start up the "HyperTerminal" program:
**Tip:** From the Windows **Start** menu, select **Programs**, **Accessories**, **Communications**, and **HyperTerminal**. (Alternatively, you can open the **Start** menu, select **Run**, type "hypertrm.exe", and click **Ok**).

**2)** Wait for the HyperTerminal logo screen to close (if applicable).

**3)** Enter a suitable name such as "Panel Modem Setup", and select a desired symbol (for HyperTerminal's selection window). Then, click **[Ok]**.

**4)** At the bottom of the next screen, select "Direct to ComX" (i.e., the port that you'll

be connecting the modem to).
Then, click **[Ok]**.

**5)** In the next screen, select:

| | |
|---|---|
| Bits per Second: | **38400** |
| Data Bits: | **8** |
| Parity: | **None** |
| Stop Bits: | **1** |
| Flow Control: | **None** |

...and, click **[Ok]**.

**6)** From the **File** menu, select **Properties**, and the **Settings** tab.

**7)** Then, click **[ASCII Setup]**, and select "Echo typed characters locally".

**8)** Now click **[Ok]** to close each of the two screens.

**9)** Connect the modem to the previously-selected serial port on the computer, and supply power to the modem using its plug-in transformer.

**10)** Now, type "**at**" (lower-case as shown, and without the quote marks), and press **Enter**.
You should see the "at" appear as you type it, and a response of "OK" when you press "Enter".

If nothing appears on-screen, this may mean that you didn't select the "Echo typed..." setting as described previously, or that the modem is either not powered up, or is plugged into a serial port that doesn't match your selection. (You can select a different port by selecting **File**, and **Properties**, and changing the setting for "Connect Using" at the bottom of the screen.) The modem not responding may also indicate a problem with your cable or it not being plugged in correctly.

**11)** (Do not proceed until you have your modem responding with "OK".)

**12)** Now, enter the settings that pertain to your modem:

USR Sportster56k: **AT&F&B1S0=1Y0&W0**

LASAT Safire 560™ Voice Modem : **AT&F0S0=1&D0&Y0&W0&W1**

**Tip:** Uppercase as shown; **0 = zero**)

Carefully check that you have typed the characters correctly, and then press **Enter**. (Look for the modem to respond with "OK".)

**13)** Now, power the modem down (i.e., remove power from the modem).

**14)** The modem is now ready to be used with a system panel. You can unplug the modem and shut down the HyperTerminal program when ready. To shut down HyperTerminal, open the **File** menu, and select **Exit**. (If prompted to save your changes, select **Yes**.)

**Tip:** If you need to set up another modem in the future, you can open your saved session instead of setting up a new one.

## Reference Information: Modem Commands Used Above

**USR Sportster56k**

| Code | Meaning |
|---|---|
| AT | Modem command identifier. |
| &F | Reset (now) to default profile |
| &B1 | Fixed serial port rate. |
| S0=1 | Auto-answer one the first ring. |
| Y0 | Use 'Profile 0' during power-up. |
| &W0 | Saves your settings in profile zero. |

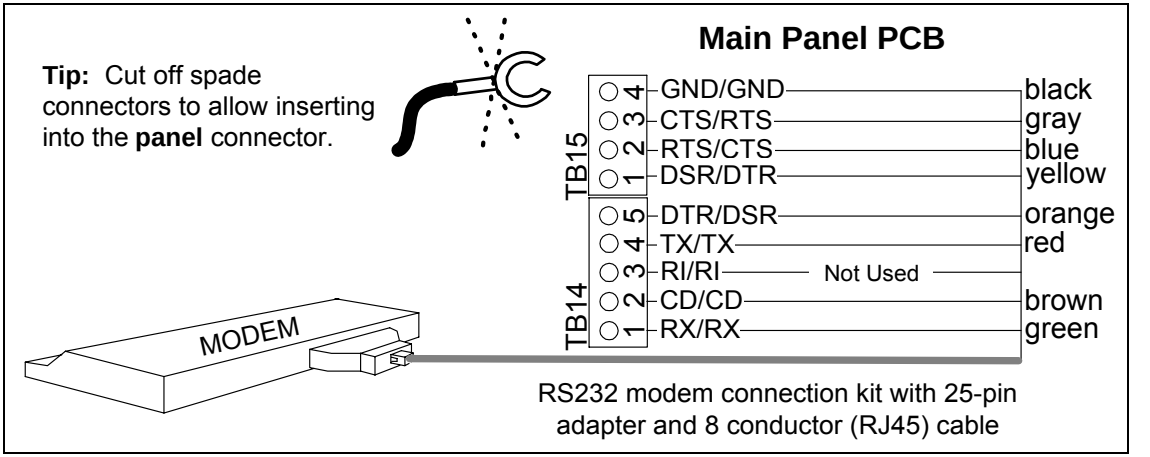
**LASAT Safire 560™ Voice Modem**

| Code | Meaning |
|---|---|
| AT | Modem command identifier. |
| &F0 | Reset (now) to profile zero. |
| S0=1 | Auto-answer one the first ring. |
| &D0 | DTR override |
| &Y0 | Use 'Profile 0' during power-up. |
| &W0 | Saves your settings in profile zero. |
| &W1 | Saves your settings in memory profile 1. |

## Panel to Modem Connection: RS-232

To connect a single system-panel to a modem, refer to the illustration below.

**Note:** External modems to be used with system panels must 1st be set up as described previously under "Panel Modem Configuration".




Once connected to the panel, the modem simply plugs into a standard telephone jack using a telephone extension cable. **Note:** Modems require a direct/analogue telephone line.

**Tip:** This configuration supports automatic dial-in transmission of alarm / activity messages to the MONITOR ISM system (in addition to Central Monitoring). **Note:** For details on connecting the panel to a phone-line via its built-in Bell 103 (300 baud) modem/dialler, refer to the MONITOR ISM System Commissioning Guide.

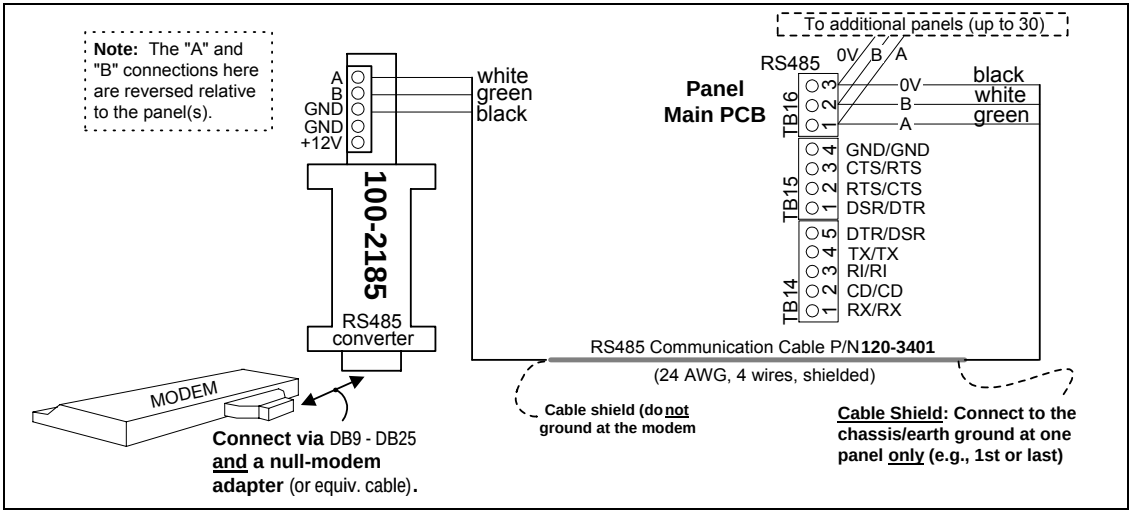
**Also See (Related Topics):**

- "New Installation? Try the Wizard!"
- "Panel Connection Overview"
- "Setting Up a New System (Commissioning)"
- "Panel Communications and Updates

## Panels to Modem Connection: RS-485 (Multi-Panel)

Using the RS-485 adapter / kit allows for longer distances between the modem and a panel, and also allows multiple panels (up to 30) to be linked together on a single modem connection.

**Note:** External modems to be used with system panels must 1st be set up as described previously under "Panel Modem Configuration".




**Tip:** An RS485 connection supports distances of at least 300 m (1000 feet) in total length.

Once connected to the panels, the modem simply plugs into a standard telephone jack using a telephone extension cable. **Note:** Modems require a direct/analogue telephone line.

**Note:** This configuration does **not** support automatic dial-in transmission of alarm / activity messages to the MONITOR ISM system (although panel connections can be initiated manually, or scheduled for regular times, and central monitoring is supported as always).

**Also See (Related Topics):**

- "New Installation? Try the Wizard!"
- "Panel Connection Overview"
- "Setting Up a New System (Commissioning)"
- "Panel Communications and Updates.

# Serial Port / Modem Setup (Communications Software)

Beginning with V4.0 MONITOR ISM Director, you can use the **Communications Wizard** to set up and initiate communications with a panel. For more information, refer to "New Installation? Try the Wizard!"

To manually set up a panel connection, refer to "**Panel Connection Overview**".

The initial topics in this section provide general information and details on starting the communications software module. To go directly to the details on making ports and modems available to the communications software, browse forward to the heading entitled "Add Modems and Serial Cables to be Used for Panel Communications".

Note: Setting up ports and/or modems through the communications software requires administrator authority under Windows XP/2000 (since data needs to be written to the "registry").

## The Communications Software

To manage panel communications, the MONITOR ISM Director program uses separate communications software on each PC to be connected to a panel or modem.

The modem(s) and direct-cable-connections you'll be using to connect with system panel(s) must be added here. (For details, refer to "Add Modems and Serial Cables to be Used for Panel Communications", to follow/below.)

**Before You Begin:** Each direct cable connection or modem to be accessed by this software must have been previously set up under MS Windows.

For details on setting up a panel connection, refer to:

- "PC-to-Panel—Direct Connection", **or**;
- "PC and Panels—Modem Connections", **or**;
- "IP Connectivity".

**Note:** To allow panel communications, the MONITOR ISM Director 'activation' key must be present on the Director PC (Director-**server** PC if applicable; ≥**V4:** USB connector, ≤**V3.3.2:** Parallel/printer port, **V3.3.3:** Either).

In a multi-PC system, the Director-server PC and software must be running as well. For more information, refer to "Client/Server Start-up Issues" (a previous section).

## Client/Server Operation

For a multi-PC installation, the communications software can be run on its own if desired. This allows utilizing ports / connections on other PCs—regardless of whether or not they are running the MONITOR ISM Director software.

In a client-server system, the panel connection set-up must be done on each specific PC to be associated with a modem and/or panel(s).

To provide access to the server/database, the PC being used as the MONITOR ISM Director server must be available on (i.e., logged onto) the network.

Note: The person logged into that PC can be any authorized PC/domain user (as set up by the Windows 2000/XP administrator).

Licensing: Client-server operation is optional, and must be selected though the license-manager software. For details on upgrading your licensing, refer to "Software Activation and Licensing".

All communications modules (running on client PCs) that are to be allowed access to the database must be identified to the server. This is done using a "Cyclic-ID" code that can be found by right-clicking the LCD/Telephone symbol on the right-hand end of the taskbar, and selecting **About**. To register this value at the Director-server PC, refer to "Client Workstation Access and Permissions".

## Start Up the Communications Software

At **each** PC associated with the panels and/or modems for the desired accounts:

- Check the Windows task bar for an LCD/Telephone symbol near the right-hand end. (If present, the communications software is already running);
- If the LCD/telephone symbol is **not** present, start the communications software:
  From the **Start** menu, select **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Communication**.

If prompted to set the "Server Location", refer to the "Change Server" description (to follow), while selecting or entering the server name or 'IP' address. (Click **Login** when finished.)

To ensure the software started: Re-check the task-bar for the LCD/Telephone symbol on the right.

Note: The "Port / Device Configuration" screen will appear automatically the first time you start this software on a specific PC.

Auto-Starting the Comms Software: For a single-PC installation, the panel communications software can be started and stopped automatically. For details, refer to "Setting Communications to AutoStart when an Operator Logs In".

If "Cannot Connect to Server" appears: This may mean that you mistyped the "Server Location", or that the

Director-server PC and/or software is not running.
**Tip:** For more information, refer to "Client/Server Start-up Issues".

### Identifying the Server to a PC Running only the Communications Software

Open the Windows task-bar (move your mouse to the bottom-right of the screen), right-click the LCD/Telephone symbol, and select **Change Server**.

If this symbol is not present: Start up the communications software as described previously / above.

If the right-click menu does not appear: This may mean that the Director-server PC or software is not running, or the activation key is not installed on the server (or only) PC.

Then, refer to the "Change Server" description (to follow) while selecting or entering the server name or 'IP' address. (Click **Login** when finished.)

If an error message appears, refer to the notes under "Start Up the Communications Software on each Applicable PC", previous / above.

On a typical MONITOR ISM Director workstation, the server is identified during login.

### Add Modems and Serial Cables to be Used for Panel Communications

Open the Windows task-bar (move your mouse to the bottom-right of the screen), right-click the LCD/Telephone symbol, and select **Port Configuration**.

If this symbol is not present: Start up the communications software as described previously / above.

If the right-click menu does not appear: This may mean that the Director-server PC or software is not running, or the activation key is not installed on the server (or only) PC.

When the 'Device Configuration' screen appears, right-click the screen and select **Add**.

Then, refer to the details for the "Port / Device Configuration Screen" while making your selections. When finished, click **Save**.

Why Can't I Change Items after Saving? You cannot edit saved settings for a comms device. If settings need to be changed, you must delete the specific modem or cable-connection, and then re-add it with the new settings. (See "If you Need to Delete..." to follow.)

After adding the desired modems and cable-connections here, they must be included in a "Communication Pool".

**Exception:** With a brand-new installation, the first 'Communications Pool' is set up for you.

To set up a communications pool, refer to "Communication Pools for System Panels".

If the database is ever **transferred** to another PC: You must ensure that either:

- Any previously referenced modems and/or "Direct Cable Connections" have been set up on the new PC, **or**;
- The equivalent on the new PC have been installed, added through this (comms) software, and included in any applicable "Communications Pools".

For details, refer to "New Installation? Try the Wizard!", or "Panel Connection Overview".

### If you Wish to Remove an Item (modem or cable-connection) from the List

Before deleting a modem or cable-connection, check to ensure it is **not** presently being used by an active communications session.

For details, refer to "Panel Communications and Updates", and "Communication Pools for System Panels".

Removing an item through the port/device configuration screen does not delete it from the PC. Rather, it removes references in the software for the specific item.

**Note:** In a client-server environment, communications sessions can be initiated from **any** MONITOR ISM Director workstation.

---

Now, open the Windows task-bar (move your mouse to the bottom-right of the screen), right-click the LCD/Telephone symbol, and select **Port Configuration**.

When the 'Device Configuration' screen appears, right-click the desired cable-connection or modem, and select **Delete**.

Final Steps:

- Add any cable or modem connection(s) if required to replace the deleted one.
  For details, refer to:
  - "PC-to-Panel—Direct Connection", **or**;
  - "PC and Panels—Modem Connections"
- Check the 'communication pools' to ensure they have the desired connections assigned.
  For details, refer to "Communication Pools for System Panels".

**Sample screens and selection-descriptions appear on the following pages.**

### Manually Shutting Down the Communications Software:

Check to ensure that panel updates are not presently in progress. (Check the status bar at the bottom of the screen.)

Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click the desired account.

In a client-server environment, panel updates can be initiated from **any** MONITOR ISM Director workstation.

To check for active panel updates, refer to "Panel Communications and Updates".

---

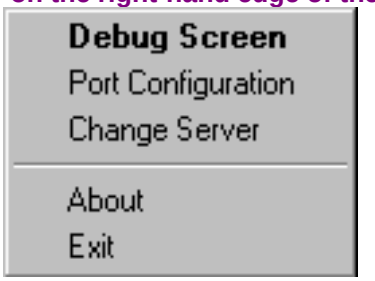
Then, (on the specific PC), right-click the LCD/Telephone symbol near the right-hand end of the task-bar, and select **Exit**. If asked to confirm, select **Yes**.

This will disable communications for panels associated with this PC until the communications software is restarted.

**Attention:** Shutting down communications while a panel update is in progress is NOT recommended, as this can leave panel database(s) in an unknown state.

---

**(Right-Click the LCD/Telephone Symbol on the right-hand edge of the Task-Bar)**




- **Debug Screen:** This selection is for internal use only;
- **Port Configuration:** Allows adding direct-cable-connections and modems for use with the MONITOR ISM Director software (for details, refer to the next screen, as needed ).
  **Note:** These must have been already been set up under MS Windows.
- **Change Server:** This allows identifying the Director-server PC (by its network "computer name", or "IP Address") to the communications software running on another PC on a network.

  This is typically used only where the communications software will be run on its own (i.e., a PC connected to panels or modems that is not running the MONITOR ISM Director software).

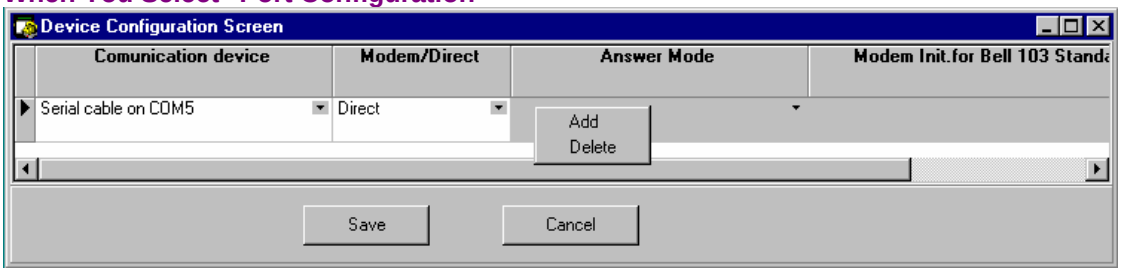
  This is typically entered once, and left as-is. The initial default is your present PC. You can get the actual value from your system administrator, or 'browse' for the Director-server PC on the network. You can also go to that PC and check its "IP Address". (For details, contact your network administrator, or refer to your Windows on-line help.)
- **About:** Shows the revision level of the MONITOR ISM Director communications software, and provides access to licensing details. As well, a "Cyclic-ID" code is shown here that allows registering the communications software at the server PC (in a client-server system).

  For details on software licensing, refer to "Software Activation and Licensing".

  To register the communications software for use on the specific PC, jot down the "Cyclic-ID" code, and then refer to "Client Workstation Access and Permissions".
- **Exit:** Shuts down the communications software.

Attention: Shutting down communications while a panel update is in progress is NOT recommended, as this can leave panel database(s) in an unknown state.

## When You Select "Port Configuration"




- **Communication Device:** The 'Serial Cable Connections and modems that have been installed under MS Windows on this PC. Select the desired one to use with a panel connection.

  **IP Network Connection (≥ v3.3)**: Setting up an IP connection is documented separately. For details, refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

  **Tip:** The right-click menu provides "**Add**" and "**Delete**" selections for utilizing additional connections on this PC, or deleting ones that are no longer needed.

  **Note:** Parallel connections (LPT ports) do not apply to this application.

- **Modem/Direct:** Whether the selected 'communications device' is a modem, or a direct-cable connection;

- **Answer Mode:** A setting for modems that tells the software if it will be communicating with a standard (external/high-speed) modem, or a panel's built-in Bell 103 (300-baud) modem/dialler.

  Bell 103 Connections: This requires a USR Sportster 56K modem at the PC. As well, due to speed considerations, Bell 103 connections are supported only in smaller systems ("Feature Set" 1, 2, or 3: one panel / up to 300 users per account). To set the 'feature-set', refer to "Account-Wide Panel Settings".

- **Modem Init. for Bell 103 Standard:** An "initialization string" (start-up settings) to be used for a "Bell 103" connection. Select a suitable one from the list for your modem.

- **Device Status:** Whether or not the selected communications device is properly recognized by MS Windows.

- **Line Status:** Whether or not an active panel connection is presently using the specific cable or modem connection.

**Also See (Related Topics):**
"New Installation? Try the Wizard!"
"Panel Connection Overview"
"Setting Up a New System (Commissioning)"
"Panel Communications and Updates

# Communication Pools for System Panels

Beginning with V4.0 MONITOR ISM Director, you can use the **Communications Wizard** to set up and initiate communications with a panel. For more information, refer to "New Installation? Try the Wizard!"

## About Communication Pools

"Communication pools" allow the MONITOR ISM Director software to manage panel communications. Each 'pool' can contain a direct-cable-connection, or one or more modems or IP connections.

**IP Network Connections** (≥ V3.30 Director software): Setting up an IP connection is documented separately. For details, refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

Including more than one modem in a 'pool' allows modems to be shared for multiple panels / accounts. Communication pools also allow selecting groups of modems on phone lines with preferred rates to specific locations.

**Tip:** The first communication pool for a new single-account system is set up automatically. When adding panels, the communications pools must be set up as desired.

**Note:** A communication pool **cannot** contain multiple direct-cable-connections, or different types of connections at the same time.

## Adding a Modem or Direct-Cable-Connection to the Selection List

(i.e., if your cable / modem / device is not in the list)

Ensure your modem(s) and/or direct-cable-connections have been set up (i.e., are available under MS Windows).

For details, refer to: "PC-to-Panel—Direct Connection", **or** "PC and Panels—Modem Connections" (as applicable).

Then, ensure your software is aware of the modem(s) and other connections (i.e., by "Adding" them through the Communications Software).

For details, refer to: "Serial Port / Modem Setup (Communications Software)".

## Adding and Setting up a Communication Pool

Select **Communications Pool** from the MyTools bar, **or** click **[Communications]** in the 'tree', and select **Communication Pool**.

Now, click **[+]** at the bottom of the form, or right-click the form, and select **Add New** from the pop-up menu.

Alternatively: You can select "New Pool" from the list at the bottom of the window. **Note:** Grid view does not apply to this screen.

Then, refer to the selection-descriptions for this screen while entering a suitable name, and adding the desired item(s) to the 'pool'.

If a modem or direct-cable-connection is not listed (that has recently been added through the communications software), click **[Refresh]** on the toolbar.

**Tip:** Your settings will be saved automatically when you move to a different screen, or select a different 'pool'.

After being configured here, communications pools can then be assigned to specific 'Panel Groups'. For details, refer to "Panel Groups and Connection Settings".

## Viewing or Changing Selections for a Communication Pool

Select **Communications Pool** from the MyTools bar, **or** click **[Communications]** in the 'tree', and select **Communication Pool**.

Now, select the desired 'pool' from the list at the bottom of the window.

**Note:** Grid view does not apply to this screen.

Then, refer to the selection-descriptions for this screen while viewing or changing selections as desired.

**Tip:** Your changes will be saved automatically when you move to a different screen, or select a different 'pool'.

## Removing an Item from a Communication Pool and/or from the List of Available Items

To remove a modem or direct-cable-connection from a 'pool', select the item under "Devices in Pool", and click **[Remove]**.

To delete an item from the list of available choices, select the item under "Devices not in Pool", and click **[Delete Device]**.

**Note:** Deleting an item here is similar to deleting it through the communications software. To add a

replacement connection to the list of choices, refer to "Adding a Modem or Direct-Cable-Connection to the Selection List" (previous/above).

### Deleting a "Communication Pool"

Before deleting a 'pool', check to ensure it is not presently being used by a panel communications session:

Select **Communications** from the MyTools bar, **or** click **[Communications]** in the 'tree', and select **Pending/Online**. Now, for each active communications session (selected at the bottom of the screen), click the panel group near the centre of your screen, and view the 'Comms Pool' and 'Results' information on the right.

**Note:** Do **not** delete a 'pool' that is found to be in use.

For more information on communications sessions, refer to "Panel Communications and Updates".

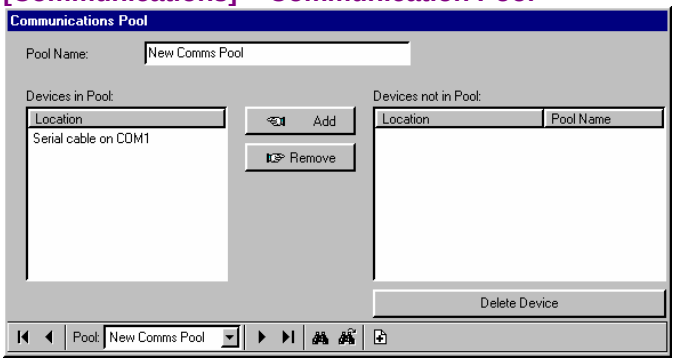
---

To proceed, select **Communications Pool** from the MyTools bar, **or** click **[Communications]** in the 'tree', and select **Communication Pool**. Select the desired 'pool' at the bottom of the window. Then, right-click the screen and select **Delete**. When asked to confirm, select **Yes**.

After deleting a communications pool, check to ensure that your panel groups have the desired communication pool assigned. For details, refer to "Panel Groups and Connection Settings".

---

## [Communications] ⇨Communication Pool




- **Pool** (bottom of form)**:** This is where you select a communications 'pool' to view or edit. This area shows a reference number assigned by the system, and the name of the 'pool', once defined;
- **Pool Name:** This is a suitable description for the 'pool' such as "PC XYZ Direct-Connect", "Bell 103 Calls (300 baud)", or "0.12 per minute to Asia".
- **Devices in Pool:** The communications devices that have been added to this 'pool'.

  A communications pool can contain one 'direct-cable-connection', or one or more modems or IP connections. It cannot contain different types of connections at the same time.
- **Devices not in Pool:** These are available modems and direct-cable (or IP) connections that can be added to a communication pool.

  For connections to be available, they must have been set up under MS Windows, and added through the communications software. For details, refer to "Adding a Modem or Direct-Cable-Connection to the Selection List" (previous/opposite).

  Client/Server Systems: Connections can be set up through any MONITOR ISM Director workstation on the network. (The list will show modems and cable-connections from all PCs.)

### (Buttons)

- **[Add]:** This allows adding a modem, direct-cable, or IP connection to the current communications 'pool'. (Select the desired item under "Devices not in Pool", and then click **[Add]**.)
- **[Remove]:** This allows removing a communications device from the current 'pool'. (Select the desired item under "Devices in Pool", and then click **[Remove]**.
- **[Delete Device]:** This allows deleting a connection/device from the list of selections.

  **Note:** Deleting an item here is similar to deleting it through the communications software. To add a replacement connection to the list of choices, refer to "Adding a Modem or Direct-Cable-Connection to the Selection List" (previous).

**Also See (Related Topics):**

"New Installation? Try the Wizard!"
"Panel Connection Overview"
"Setting Up a New System (Commissioning)"
"Panel Communications and Updates

# Setting Up a New System (Commissioning)

**Note (≥v4.10):** If you wish to use SQL Server to manage your database, refer to **"Advanced Database Features"**

## Welcome

There are a number of ways to set up a new system:

### Enter the information yourself

- Using the Wizard (Try It!)
  Menu: **Tools**, ⇨**Configuration Wizard**
  Related Topic: "New Installation? Try the Wizard"
- Form by form on your own (described in this section--to follow);

### Upload the Data from a Panel that Has Already been Set up (Get from Panel)

- For details, see "**Importing Settings from an Existing MONITOR ISM Director System Panel**" (in a following section/below);

### Transfer the Data from Elsewhere

- Manually import data from a text file (**Caution:** Your file must be structured properly.);
  Menu: **File**, ⇨**Import Users**
  Related Topic: "Manually Importing User-Data From a Text File"
- Automated card import (interfacing with an ERM system);
  Menu: **[Management]**, ⇨**Database Maintenance**, ⇨**User Import**🗀
  Related Topic: "Automated User-Import (Used for: ERM Integration)"

### Additional Things you Need to Do

- Activate any optional features, and extend your software expiry date;
  Menu: **[Start], Programs, MONITOR ISM Director-License Manager.exe**
  Related Topic: "Software Activation and Licensing"
- (For client-server systems): Identify the client PCs to the Director-Server PC;
  Menu: **[Management]**, ⇨**PC Client**, ⇨**PC Client Access** Related Topic: "Client Workstation Access and Permissions"

# Before You Begin (Form-by-Form Data Entry)

Do I Need an LCD Keypad?: Setting up a new system/panel does **not** require an LCD keypad to be installed. (You only need to know the serial number of each main panel and expansion module--look for a small hand-written label on the back of each circuit board.) Transferring settings from an Existing Panel: In this case, you **will** need an LCD keypad to view (or set) the "Panel Code" (**S001:5**) and "Third-Party Password" (**S005:1**). **Note:** The "Panel Code" must be set to a non-zero value.

**1)** This section assumes that your system devices (panels, expansion modules, doors, and sensors) have already been installed, or that someone else is installing them.

**Note:** If you do require details on physical installation of a system components, refer to the MONITOR ISM Commissioning Reference Guide, in conjunction with the installation instructions provided with each physical device.

**2)** If your MONITOR ISM Director **software** has not been installed yet, **or** if you are upgrading from an earlier version of software, refer to "PC Issues and Software Installation".

**3)** The provided 'activation key' needs to be plugged onto the server (or only) PC. ( ≥**V4:** USB connector; ≤**V3.3.2:** Parallel/ printer port; **V3.3.3:** Either).

**The activation key provides 90 days of operation with standard features. For additional features, client-server operation, or extended duration, you must run the license-manager program.** For details, refer to "Software Activation and Licensing".

**Note:** For a **client-server** installation where you'll be working from a separate client PC, you'll also need to identify this PC (and other client PCs) to the server. For details, refer to "Client Workstation Access and Permissions".

**4)** If you wish to transfer settings from a MONITOR ISM system main panel that was programmed through a system LCD keypad, refer to "Importing Settings from an Existing MONITOR ISM Director System Panel", to follow / below.

**5)** For each main panel, and expansion / application module (POD) in the system, you will need to know the device's serial number so it can be correctly identified to the software.

**Tip:** The serial number for each device can typically be found on a hand-written label on the device's circuit board.

**6)** You must be aware of how the facility is to be divided into 'Areas', if applicable. In general, this will typically pertain to departmental divisions, or any other major divisions where different monitoring characteristics are to be in effect, and/or where a different set of users are to have access.

**Note:** If you need more information on this, find out from the installation co-ordinator, building manager, or other contact at the site.

**7)** For basic testing of access-control functions, you will need at least one access card / token with a known "ID" number (and optional 'PIN' number).

## Basic Settings for Testing, and Panel Communications

Nothing feels better when setting up a new system than that first "Access Granted". If your system does not include door control, the equivalent might be verifying that first motion sensor as being monitored only when the area is armed (On), or checking system status through a system (LCD) keypad.

The steps that follow provide the 'minimalist' approach to entering basic settings, and getting you communicating with a panel so you can transfer the information, and test for basic operation.

**Tips:** In general, look for the sub-topic that refers to "**Adding**..." in each referenced section. As well, for initial testing, you can typically leave all settings at the factory default values.

### Basic Account and Device Settings for Initial Testing

| Step (Do This): | For details, refer to: |
|---|---|
| **1)** Set up the operators required to complete this task, along with their associated permissions. | "Operators...", and "Operator Permissions" |
| **2)** Multi-Account Systems: Set up account folders and accounts as desired. | "Working with Accounts and Folders (multi-account systems)" |
| **3)** Set these items under "Account Information": • Account Name; • Account Type; • Panel Operating Mode; • Panel Version; • Feature Set. | "Account-Wide Panel Settings..." |

For system security, you may also wish to change the default 'service PIN'.
**Tip:** Be sure to log the new Service PIN somewhere, and/or select one that is easy to remember.

| | |
|---|---|
| **4)** Rename the default 'Panel Group' and Panel name if desired, or set up new ones as required for additional panels. | "Panels, Panel Groups, and Related Settings" |

**Tip:** You can leave any panel communications settings as-is for now.

| | |
|---|---|
| **5)** If the site includes access-controlled doors and/or elevators, be sure to specify the format of the access cards/tokens. | "System Card-Access Settings" |
| **6)** If you wish to initially test any scheduling features, be sure to create at least one schedule for testing purposes. | "Schedules for User-Access and Area Automation" |
| **7)** Ensure at least one "Area" has been set up to allow testing your initial basic configuration. | "Areas and Related Settings" |
| **8)** Ensure one sample user "Authority Level" is available to allow testing access-control and other user-related features. | "Authorities for Users/Entrants" |
| **9)** Define one system "User" (with sample access card/token) to allow testing access-control and other user-related features. | "Users (Entrants / Panel Users)" |
| **10)** From the installed devices, select one LCD keypad module, one door controller module (if applicable), and one point expansion module, and define these items through the software. | "Modules (PODs)" |

***...continues...***

| | |
|---|---|
| **11)** Similarly, select 1-3 doors, and monitored sensors, and create entries for these items. | "Doors, Readers, and Related Settings", and "Input Points—Monitored Sensors". |
| **12)** Select which system (equipment) conditions are to be monitored or ignored.<br>**Tip:** This helps to avoid unnecessary signalling at area keypads. | "Equipment Settings (Pseudo / Internal Inputs)". |

### Settings Required for Panel Communications

| Step (Do This): | For details, refer to: |
|---|---|
| **13)** Set up all items as required for connecting with the panel. | "Panel Connection Overview" |

### Transfer Settings and Test for Basic Operation

| Step (Do This): | For details, refer to: |
|---|---|
| **14)** Set up and activate a "Send to Panel" communications session with the specific panel(s). | "Panel Communications and Updates" |
| **15)** After the data is transferred, test that the sample card can unlock the applicable door(s). | For details on using a system LCD keypad for various tasks, refer to the MONITOR ISM (panel/keypad) User's Guide. |

### Finish Data Entry for All Devices, Areas, and Desired Operation

With basic data entry and testing completed, now you can define the rest of the devices in the system, and customize settings for desired operation. Your database of 'Users' will need to be entered as well.

For a large system, you may wish to divide the user-list and system devices into manageable 'chunks'—so you can keep track of what's been done, and what still needs to be done as you go along.

**Tip:** You may wish to set up any required "Schedules" right-away, since they can be assigned to user-authorities, areas, and readers.

For more information, refer to the "Administration" and "Configuration" chapters in the table of contents (at the front of this guide).

# Importing Settings from an Existing MONITOR ISM Director System Panel

**Panel & Software Revisions:** Beginning with **V3.20**, the Monitor ISM Director software can connect with panels **V2.0** and higher.

Associated panels must be the same rev. level, and the Director software must typically be the same level or higher. Exception: V3.3 panels OK with V3.20 software (if IP-related features are not needed).

For an existing MONITOR ISM Director system that had been programmed locally (without software), the settings from a single panel can typically be imported into the software. Typical steps appear below.

**Note:** These steps pertain to sites that were programmed through a system **keypad**. For a site being upgraded from an earlier version of MONITOR ISM Director software, refer to "Upgrading from an Earlier Version of Software".

**1)** Before You Begin: Obtain this information from a service person for the site.

- **+** The panel serial number (**S005:0**, or check for a small hand-written label).
- **+** The "Panel Code" / Account UID (**S001:5**) and "Third-Party Password" (**S005:1**).

Be sure to write down the information above, as it will be needed in step **6**. **Note:** If the panel's "Third-Party Password" is zero (0), it **must** be set to a non-zero value through a system keypad. Conversely, if the "Panel Code" (Account UID)" is zero, it will be set automatically by the software.

**2)** Set the "Account Name" as desired. For details, refer to "Working with Accounts and Folders". Multi-**Account** Systems: Rename the default 'Account folder' and Account name if desired (or set up a new account folder and/or 'Account' to be associated with the specific panel).

**3)** Rename the default Panel Group and Panel name if desired (or set up new ones if desired). For details, refer to "Panels, Panel Set up all items as required for connecting with the panel. For details, refer to "Panel Connection Overview".

**4)** Set up all items as required for connecting with the panel. For details, refer to "Panel Connection Overview".

**5)** Set up and activate a "Get from Panel" communications session. For details, refer to "Panel Communications and Updates".

**6)** This would be a good time to check what information was obtained from the panel. The list of users is a good place to start. For details, refer to "Users (Entrants/Panel Users)".

**7)** When finished, you can enter the facility address information if desired, and set up any operators who will have access to this account (this information is not stored at the panel). You can also set the "Service PIN", and "Feature Set" for the account at this time. For details, refer to "Account-Wide Panel Settings", and the section on "Operators".

**8)** Now, you may wish to add new items to the database, or set up additional features. For details, refer to the table of contents.

# Customizing the MyTools Bar

## You can Customize Your MyTools Bar

The MyTools bar/list can be customized as desired. The MyTools settings are saved separately for each operator, allowing everyone to use their preferred layout.

**Tip:** The contents of your MyTools bar (i.e., for the present operator) are saved automatically when you change any settings through this screen.

## Opening and Positioning the MyTools Bar

To open or close the MyTools bar, click **[MyTools]** on the toolbar. To change its position, click-and-drag the top or left edge of the bar to a new location.

You'll typically use the MyTools bar, **or** the Tree, but not have both of them open at the same time.

**Notice:** If no items are set to appear on the MyTools bar, it will appear as a small empty button (right-click it to access this screen).

To save the position of your MyTools bar (along with other desktop changes) open the **View** menu, select **Desktop Settings**, and **Save**. (You will also be asked if you want changes saved when you logout or exit.)

## Changing the Look or Content of Your MyTools Bar

**Tip:** If you are doing this for someone else, be sure to login as that operator.

To access the "Customize MyTools" screen, open the **View** menu, select **MyTools**, and then **Customize**. (You can also right-click the double-line at the starting-edge of the MyTools bar, and select **Customize**.)

**Adding Items:** Select the desired item(s) under "Available Buttons" and click **[Add]**. (Alternatively, you can drag-and-drop items into position.)

**Tip:** Use the "Separator" to visually separate blocks of items on your MyTools bar.

**Removing Items:** Select the desired item(s) under "Current MyTools Buttons" and click **[Remove]**. (You can also click-and-drag items out of the list.)

**Changing Item-Positions:** Select the desired item(s) under "Current MyTools Buttons", and click on the 'hand' pointing up or down as necessary. You can also 'drag' items to a new position (release items just above the desired position).

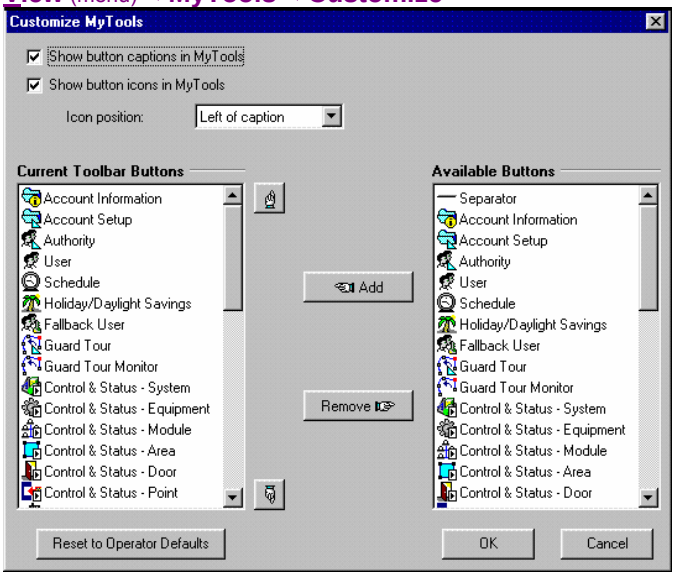
**Changing Item-Names:** Click twice **slowly** on the item-name in the "Current MyTools Buttons" list, and edit the name as desired. When finished, press the **[Enter]** key (or click elsewhere on the form).

---

For more information, refer to the selection-descriptions for this screen. When finished click **OK** to save your settings.

If you wish to leave your workstation: Click **[OK]** before you leave, and make any additional changes when you return.

## View (menu) ⇨MyTools ⇨Customize




- **Show Button Captions in MyTools:** Whether or not you want the text-descriptions to appear for items in your MyTools bar.
- **Show Button Icons in MyTools:** Whether or not you want the graphic symbols to appear for items in your MyTools bar.
- **Icon Position:** This selects the position of the graphic symbols relative to the text-description for each item in the MyTools bar (above, below, to the left, or to the right).
- **"Current MyTools Buttons" List:** This list shows the items that have been selected to appear on your MyTools bar.

  This also shows the order of the items on your MyTools bar, in addition to the text-name for each item (refer to the task-descriptions for details on changing item positions or renaming items).
- **"Available Buttons" List:** This list shows all items that are available to you (as per your operator-permissions).

  **Tip:** Use the "Separator" to visually separate blocks of items on your MyTools bar.

### Buttons

- **[Up] / [Down] Hand Symbols:** These buttons allow moving selected items up or down in the "Current MyTools Buttons" list.
- **[Add]:** This allows adding item(s) to your MyTools bar (first select the item(s) in the "Available Buttons" list).
- **[Remove]:** This allows removing items from your MyTools bar (first select the items in the "Current MyTools Buttons" list).
- **[Reset to Operator Defaults]:** This resets your list of selected items to include everything in the "Available Buttons" list (i.e., all items available through your operator-permissions).
- **[OK]:** This saves your selections and closes the screen.
- **[Cancel]:** This closes the "Customize MyTools" screen without saving your selections.

If you wish to leave your workstation: Click **[OK]** before you leave, and make any additional changes when you return.

# System Capacities

## Software Licensing and Activation Key

Maximum system capacities and types of expansion / application modules supported depends on your software licensing, which is managed through a small 'activation key' and the license-manager software.

To update your system capacities, refer to "Software Activation and Licensing".

## Checking or Updating Your System Capacities

To check your present system capacities, open the **Help** menu, and select **[About]**. Then, click **[License Info]**, and scroll within the small window to view your capacities.

(Any three-letter acronyms typically pertain to different types of door-controller modules, and other peripherals.)

To make use of your available capacities, the panel "**Feature Set**" needs to be set appropriately.

For details, refer to "Account-Wide Panel Settings".

**Note:** Some of the capacities that follow also require additional panel memory to be installed (see the next table). System upgrades may involve a combination of upgrading software, hardware, and/or licensing (refer to the instructions provide with the upgrade kit).

## Software Versions and Basic Capacities

| License => | PRIME | ENTERPRISE | ENTERPRISE ELITE |
|---|---|---|---|
| Users | 1,000 | 10,000 | 64000 |
| Doors | 16 | 1920 | 1920 |
| Graphical User Interface | 1 | 8 | 8 |
| Communication Clients | 1 | 3 | 3 |
| Panel | 1 | 60 | 60 |
| Accounts | 1 | 10 | 100 |
| Visual Director | × | ✓ | ✓ |
| Photo-badging | × | Optional | ✓ |
| Client/Server Deployment | × | ✓ | ✓ |
| Database Views and SQL Server Support | × | × | ✓ |
| ERM Capability | × | × | “Advance Features option” |

Notes and Exceptions: • Client/Server operation also allows multi-server login; • Adding panels allows for more areas, sensors, doors, etc.; • Elevator (lift) capacity is shared with the door capacity--max. 32 total (per panel); • Floor capacity is the same per panel or account (124), and can be for one building, or shared across multiple buildings; • Suite capacity is per panel, and is reduced by 5 for each (other type of) hardware module present.

Converted TDC/PDC Door Controllers: Up to 10 per panel (combined total). The above lists show only the items that are **different** between the two system versions. The sections that follow describe the overall maximum system capacities. * Support for suite-security keypads requires a "Feature-Set" selection of **5** or higher. To set this value, refer to "Account-Wide Panel Settings".

## System-Wide Capacities

**Client / Server Operation:** This is dependant upon your software licensing (as managed through the license-manager software).

**No. of Client Workstations and/or Panel-Connection Ports:** These items are limited only by the licensing agreement, but subject to network performance, and system size / activity.

(Licensing is presently available for up to **3** panel connection ports.)

**Operators:** Not limited (subject only to hard-drive space).

**Activity / Communications Messages:** With auto-purging enabled, the latest 240,000 event/alarm messages, and 50,000 communications logs will be retained. With auto-purging disabled, the Director software does not specifically limit the number of event messages.

Notes: Archiving or purging on a regular basis is highly recommended since the system can become slow and/or unstable if database files become very large. As well, MSDE has an overall database file size limit of 2 GB. There is no specific limit for systems managed under SQL server. Related Topics: Removing old Activity or Audit Logs (Purge)

**Saved Reports:** Not limited (subject only to hard-drive space).

### Account Capacities

**Panels and Connections:** Number of panels per account is limited by the software licensing (max. 60), and is also subject to PC and network performance. Up to 30 panels at a time can be connected together to share a single connection to a PC or modem. The number of panel connection **ports** is limited by licensing (max. 3), and by port/modem availability, and PC performance.

Notes / Exceptions:

- The "Prime" version of the MONITOR ISM Director software ('feature set' 1, 2, 3, and 4) is limited to 1 panel per account.
- Automatic dial-in to transmit messages to the MONITOR ISM Director system is not supported through a shared connection (a modem is needed for each remote panel).
- Remote management through the panel's built-in Bell 103 (300 baud) modem/dialler is limited to 'feature set' 1 – 3 (one panel / up to 300 users per account).

**Users:** Same as the 'per panel' capacity (see the next table).

Card No./IDs vs. Firmware: Beginning with **V3.2** panel firmware, 32-bit ("9.5 digit") card numbers are supported (previously 7 digits). This also requires ≥ **V1.5** door/elevator controller firmware. With panel firmware **V3.2**, card IDs can be up to 999999999. With firmware **≥V3.31**, card numbers can be up to 4294967295.

**Authorities:** Same as the 'per panel' capacity (see the next table).

**Schedules:** 50 (with support for 3 types of holidays);

**Holidays:** 30 (plus the dates to change between daylight savings and standard time).

**Floors:** 124 (in a single building, or the combined total for multiple buildings).

**Guard Tours:** Not limited (subject only to hard-drive space).

### For each Main Panel (as per software licensing and 'Feature-Set')

| Feature Set | Required RAM Expansion | Authority Levels | History Events (Logs) | Users | User Names at Keypads | User LogOn | Panels Allowed | Minimum Software Needed |
|---|---|---|---|---|---|---|---|---|
| **1 *** | None | 30 | 1024 | 20 | Yes | Pin Only | 1 Only | Prime |
| **2 *** | None | 30 | 1024 | 100 | Yes | 2d ID + Pin | 1 Only | Prime |
| **3 *** | None | 30 | 1024 | 300 | Yes | 3d ID + Pin | 1 Only | Prime |
| **4 *** | None | 100 | 2048 | 1000 | Yes | 3d ID + Pin | 1 Only | Prime |
| **5 †** | None | 100 | 2048 | 1000 | Yes | 3d ID + Pin | Multiple | Enterprise |
| **6 †** | None | 100 | 2048 | 2000 | Yes | 4d ID + Pin | Multiple | Enterprise |
| **7 †** | None | 100 | 1024 | 4000 | No | 4d ID + Pin | Multiple | Enterprise |
| **8 †** | 512K Bytes | 500 | 8192 | 10000 | Yes | 4d ID + Pin | Multiple | Enterprise |
| **9 †** | 512K Bytes | 500 | 8192 | 10000 | No | 4d ID + Pin | Multiple | Enterprise |
| **10 †** | 1M Bytes | 500 | 8192 | 20000 | Yes | 5d ID + Pin | Multiple | Enterprise Elite |
| **11 †** | 1M Bytes | 1000 | 16384 | 20000 | No | 5d ID + Pin | Multiple | Enterprise Elite |
| **12 †** | 1M Bytes | 1000 | 16384 | 20000 | Yes | 5d ID + Pin | Multiple | Enterprise Elite |
| **13 †** | 2M Bytes | 1000 | 65536 | 64000 | No | 5d ID + Pin | Multiple | Enterprise Elite |
| **14 †** | 2M Bytes | 1000 | 32768 | 64000 | Yes | 5d ID + Pin | Multiple | Enterprise Elite |

† Supported 'feature-set' depends on your software licensing (as managed through the license-manager software). Feature-sets higher than 4 are supported only with the "Enterprise" version of MONITOR ISM Director.

* Local user admin. (via keypad) is supported in all systems, while local system configuration is supported only in single panel systems set to "**Feature Set**" 1, 2, 3, or 4. **Exception:** Keypad programming is supported in all systems for any 'application' modules that require this due to custom settings stored only at the module itself (HSC/printer module, RF/wireless module, and Smart PODs).

For details on setting the 'memory model', refer to "Account-Wide Panel Settings...".

## Common Per-Panel Capacities (not based on 'Feature-Set')

**Expansion / Application Modules:** **24** system LCD keypads and/or other modules, or **60** suite-security keypads (see exceptions).

Exceptions: Suite-security keypads can be mixed with other modules if desired (the capacity for suite-security keypads is reduced by **5** for each system LCD keypad, and each other expansion / application module added. (For example, with 2 system keypads, 3 door controllers, and one point expansion module, a full-capacity "Enterprise" system could still support 30 suite-security keypads).

Converted TDC/PDC Door Controllers: Up to 10 per panel (combined total).

**Areas:** 16 monitored 'areas' per panel;

**Doors:** The "Enterprise" version of the software supports up to **32** doors **per panel**. The "Prime" version supports a **single panel** with **16 doors**.

**Elevators:** The "Enterprise" version of the software supports up to **32** elevator (lift) cabs. Exception: This is shared with the door capacity (max. **32** combined total).

**Floors:** The "Enterprise" version of the software supports 124 unique access-controlled floors. (These can be in a single building, or the combined total across multiple buildings.)

**Monitored Sensors (Input Points):** 128 per panel (8 of which are physically on the main panel itself).

**Programmable Outputs:** 124 per panel (plus 4 internal outputs that can be used with the paging feature).

## Expansion Module Capacities and Features

### Inputs and Outputs

| | LCD keypad | Suite Keypad | Fire module | MAP annun. | RF module | Door ctrlr | I/O expansion | Elevator Controller |
|---|---|---|---|---|---|---|---|---|
| Inputs | 1 | 8 / 2 | 8 class A/B | 4 | 32 | 8 | 8<br>16 | 0 |
| Outputs | 1 | 2 / 1 | 2 (8) | 16 | - | 4 | 2 (10)<br>8 (16) | 0 |

### Supervision

| | LCD keypad | Suite Keypad | Fire module | MAP annun. | RF module | Door ctrlr | I/O expansion | Elevator Controller |
|---|---|---|---|---|---|---|---|---|
| Normally Closed | • | • | - | • | • | • | • | • |
| Normally Open with EOL | • | • | - | • | • | • | • | • |
| Normally Closed with EOL | • | - | - | • | • | • | • | • |
| Form C with EOL | • | • | - | • | • | • | • | • |
| Dual EOL | • | - | - | • | • | • | • | • |
| Class 'A' (4 wire loop) | - | - | • | - | - | - | - | - |
| Class 'B' (2 wire loop) | - | - | • | - | - | - | - | - |
| Tamper | • | • | • | • | • | • | • | • |

*…continues…*

## Readers / Doors

| | LCD keypad | Suite Keypad | Fire module | MAP annun. | RF module | Door ctrlr | I/O expansion | Elevator Controller |
|---|---|---|---|---|---|---|---|---|
| Doors | N/A | - | N/A | N/A | N/A | 2<br>4<br>8 | N/A | 2 (elevator cabs) |
| Readers (In/Out) | N/A | - | N/A | N/A | N/A | 4<br>8<br>16 | N/A | 1 (inside cab) |
| Reader Features | | | | | | | | |
| • Reader Tamper | N/A | - | N/A | - | - | • | - | • |
| • 5/12 $V_{DC}$ Selectable | N/A | - | N/A | - | - | • | - | • |
| Reader Support | | | | | | | | |
| • Wiegand | N/A | - | N/A | N/A | N/A | • | N/A | • |
| • Magstripe | N/A | - | N/A | N/A | N/A | • | N/A | • |
| • Proximity | N/A | - | N/A | N/A | N/A | • | N/A | • |
| • Arming Station | N/A | - | N/A | N/A | N/A | • | N/A | - |
| Door Unlock Relay | - | - | - | - | - | • | - | • |
| Auxiliary Relay | - | - | - | - | - | • | - | • |
| Module Heartbeat | - | - | - | - | - | • | - | • |
| Module Comm. | - | - | - | - | - | • | - | • |
| Module Low Power | - | - | - | - | - | • | - | • |

## Standards

| | LCD keypad | Suite Keypad | Fire module | MAP annun. | RF module | Door ctrlr | I/O expansion | Elevator Controller |
|---|---|---|---|---|---|---|---|---|
| ULC | • | - | - | • | • | - | • | - |
| UL | • | - | - | • | - | • | • | - |
| CE | • | - | - | - | - | • | • | - |
| DOC (ICAN) | • | • | • | • | • | • | • | - |
| FCC | • | • | • | • | • | • | • | - |

**Main Panels:** The main panels comply with all of the standards above.
Note: UL commercial burg. compliance will require the attack-resistant main cabinet.

# Advanced Database Features

## Overview of Features

MONITOR ISM Director provides a number of advanced database features:

• Database Query: Provides database 'views', allowing you (or other software) to link to the Director database to perform custom reporting tasks; • Automated User Import: Allows the Director software to be interfaced with a personnel management system (Also called: "**E**nterprise **R**esource **M**anagement");

• SQL Server Support: Allows your company's IT department take charge of the database under SQL Server.

Note: These features are optional and/or depend on your software licensing. **Details:** "System Capacities" (previous).

**Tip:** Many of the topics in this section (**>>**) either work together or apply to more than one database feature. As such, it is very useful to read all of these topics at least once before you attempt to set up any of this.

## SQL Server Support

**Tips:** This feature is NOT required to enable any other features. Advanced database features are limited only by software version and licensing. This feature has also been referred to as "**Open Database**". This term is being phased out due to misinterpretation.

### Introduction

You now have the option of letting your company's IT department take charge of the Director database under SQL Server (e.g., including maintaining backups, etc.). In this case, the MONITOR ISM Director database will be placed on your SQL Server PC during software installation.

This is intended only for larger systems that are already using SQL server to manage other databases.

### Installing with SQL Server Support

During software installation (and/or if you run the database-generator utility on its own), you will be asked if you wish to manage the database through a SQL-Server PC. If you select "Yes", you will be asked for a number of "User Logins" and passwords. These are discussed in the following section ( **>>** ).

Using the DB-Generator to Switch to SQL Server Support: Before running the database generator utility, ensure you have an up-to-date backup of the database (created with the current/newest version of Director software), as this will be needed to restore your data thereafter. Notice: If you accidentally select SQL server support during a software upgrade, switching back to the standard approach may require removing the MONITOR ISM Director software and/or Microsoft's MSDE software, and then reinstalling the Director software. You will be prompted accordingly if this applies to you.

# User-Logins (Needed for: Database Query, and SQL Server Support)

## User 'Logins'

The "Database Query" feature, and SQL-server support require you to provide some login information that will be used to access the MONITOR ISM Director database.

**Tip:** With a system managed under SQL server, this information must match these values for the Director database entered at the SQL Server PC.

Also, if you wish to change these settings later on, you must ensure that no one is presently accessing the Director database (see the steps under "Table Repair Utility").

## Overview

If you select SQL-server support during installation, you will be prompted for the "user login" information directly. Otherwise (or to change the settings later), you need to access the required form manually:
**MONITOR ISM Director-Repair.exe** (⇨**User Logins** 🗀).

## The Table Repair Utility

In a client-server MONITOR ISM Director system, the database/table repair utility is available **only** through the server PC.
(This is the PC that includes "...Director-Server.exe".

Before using the table repair utility, first:

1) Client-server systems: Ensure that **no** copies of the MONITOR ISM Director (or communications) software are logged into the database (**Tools** menu, ⇨"Who is logged In").
2) **Shut down** Your MONITOR ISM Director (and communications) software (details follow).

Note: The communications software pertains to PCs that connect with system panels--via cable, modem, or IP-LAN/WAN (≥V3.3).

## Shutting Down the MONITOR ISM Director Software

At the MONITOR ISM Director server, and each client PC (that uses this main database):

- Open the **File** menu;
- Select **Exit**;
- Select **Yes** when asked to confirm.

## Shutting Down Communication Modules

At each PC that connects to system panels or modems:

- Open the task bar (move your mouse to the bottom-right of the screen);
- Check for a telephone/communication symbol on the right-hand side;
- If present, right-click this symbol, and select **Exit** from the pop-up menu.
- Select **Yes** when asked to confirm.

## Setting Up "User Logins"

Before starting the table repair utility, ensure that all copies of the MONITOR ISM Director software (and associated server and communications components) are **shut down**.

---

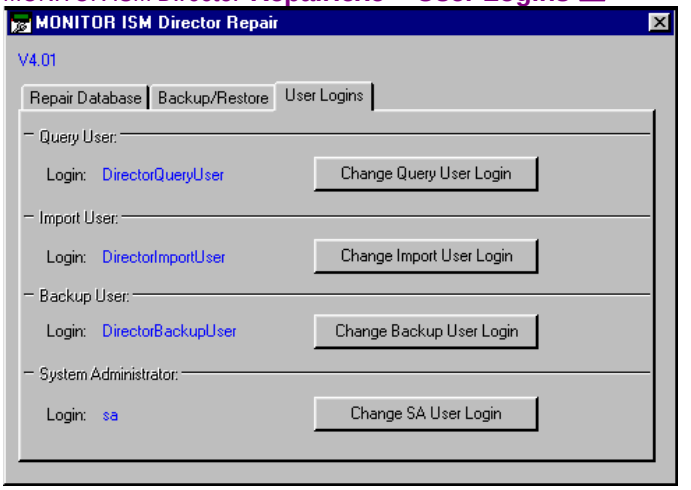
At your MONITOR ISM Director workstation (server PC if client-server) open the Windows **Start** menu, and select **Programs**, **MONITOR ISM Director V4**, and **MONITOR ISM Director-Repair**.

---

Select **User Logins** 🗀, and then refer to the item-descriptions for this screen while making your selections.

When finished, click the **[x]** in the upper-right corner of the 'Director-Repair' screen to close the database check/repair utility.

MONITOR ISM Director-**Repair.exe** ⇨**User Logins** 🗀




When you click **[Change...]** for each item below, you will be asked to enter a "User Login" and password. For a typical system (i.e., not being managed under SQL server), you can leave the login names at our default settings, and enter only your desired passwords.

**Tip:** For a system managed under SQL server, this information must be set to match the 'User Logins' (and passwords) for the Director database as entered at the SQL Server PC.
Notice: If you wish to change these settings later on, you must ensure that no one is presently accessing the Director database (see the steps under "Table Repair Utility", previous/above).

- **Query User / Change Query User Login:** This allows you (or your custom software) to link to the database and view stored information. This allows setting up custom queries (reports), and is also used by the auto-user import feature (ERM integration).

  Server roles: None required.

- **Import User / Change Import User Login:** This is used with the automated user import feature (ERM integration) feature.

  This is required when opening and editing the tables: **ErmUserImport** and **ErmUserImportResult**;
  Server roles: None required.

- **Backup User / Change Backup User Login:** This allows the MONITOR ISM Director software to backup and restore its database (for a system managed under SQL server);

  Server roles: Disk Admin.; Database Creator.

- **System Administrator / Change SA User Login:** This allows the MONITOR ISM Director software to access the database (for a system managed under SQL server).

  Server roles: System Administrator.

# Linking to the Database (Used for: Custom Query/Reporting; ERM Integration)

## Introduction

Director's "Database Query" feature allows you (or your custom software) to link to the database, and view or use the data as desired. (This pertains to read-only database 'views' (provided) that mirror the contents of the database.) This allows setting up custom reports (e.g., setting up your own custom queries in MS Access, or using a program such as "Crystal Reports". Database 'views' are also used with the auto user-import feature (ERM integration).

Notice: To generate custom queries and reports, you need to create a new (blank) database, and link to the Director database as discussed below.

## Typical Systems (i.e., not running SQL Server)

"Query User Login" information is required to allow linking to the database. For a system set to be managed under SQL server, you will be prompted automatically for this during the installation. With a typical system (i.e., NOT using SQL server), you'll need to set this through the table repair utility.

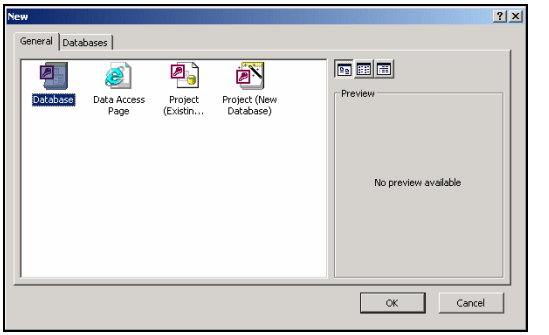
Details / Steps: See "User-Logins" (previous).

Auto-User Update (ERM Integration): This feature uses the "**Import**UserLogin' instead for any tasks involving the 'ErmUserImport' and 'ErmUserImportResult' tables.

## Linking to the Database to Generate Custom Queries and Reports

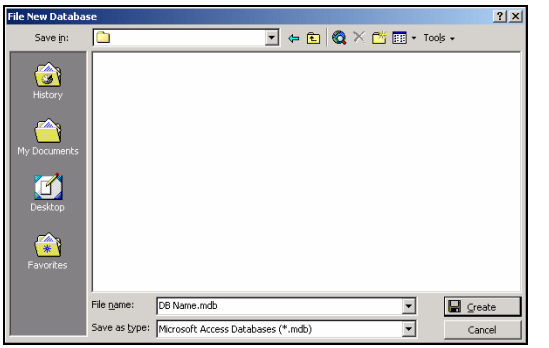
The following example and screens pertain to using MS Access to link to the database.

**1)** In MS Access, open the **File** menu, and select **New**. **Tip:** From now on, I'll condense menu selections (e.g., **File**, ⇨**New**).



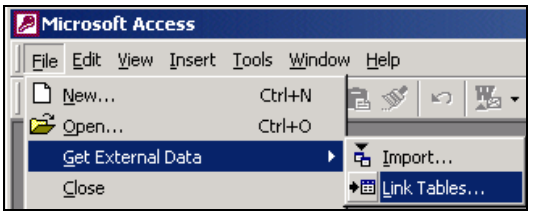

Double-click "Database".

**2)** In the next screen, give it a suitable name.

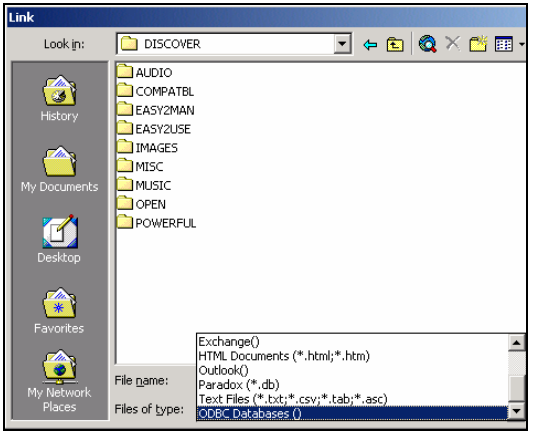



Then, click **[Create]**.

**3)** Select: **File**, ⇨**Get External Data**, ⇨**Link Tables** like this:

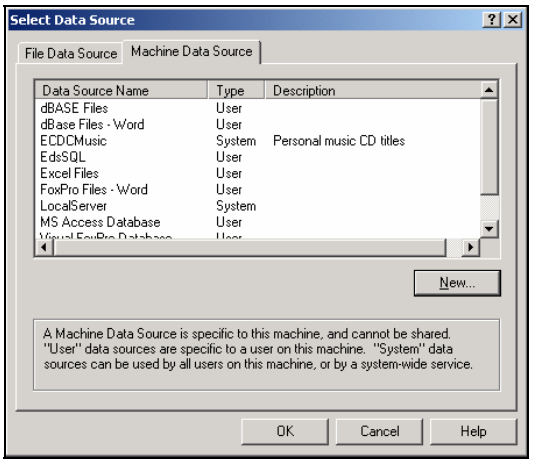


**4)** You can ignore most of this screen.



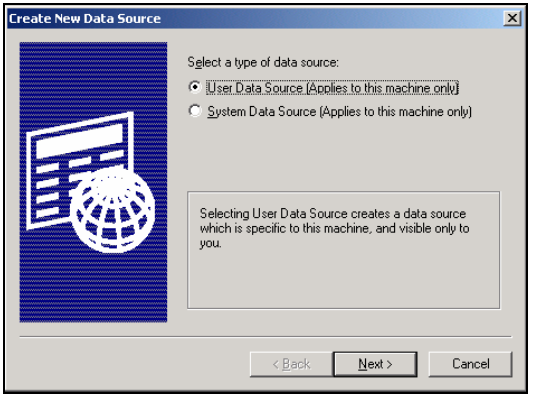

At the very bottom, open the "Files of type" field [▼], and select "**ODBC Databases ()**".

**5)** You can ignore most of this one, too:



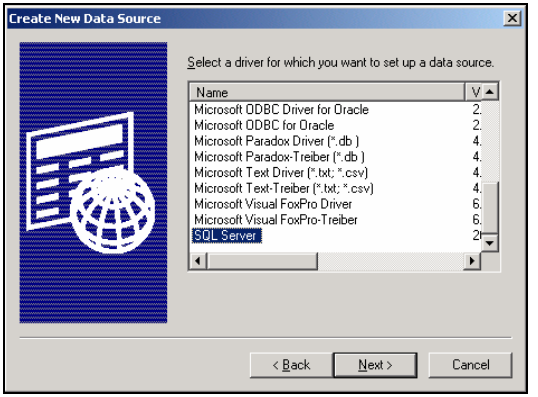

Just select **Machine Data Source**🗀 at the top, and click **[ New ]**.

**6)** This screen will appear:



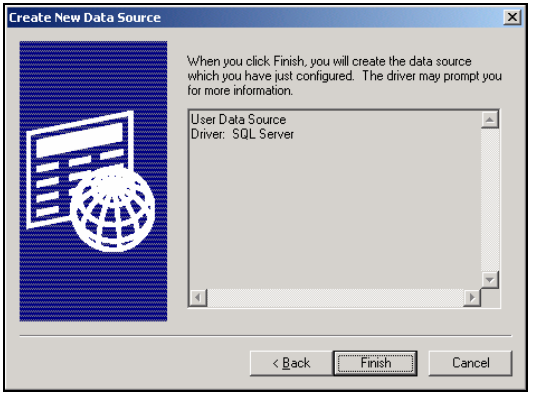

Select: **User Data Source (...)** at the top, and click **[ Next ]**.

**7)** In the next screen:



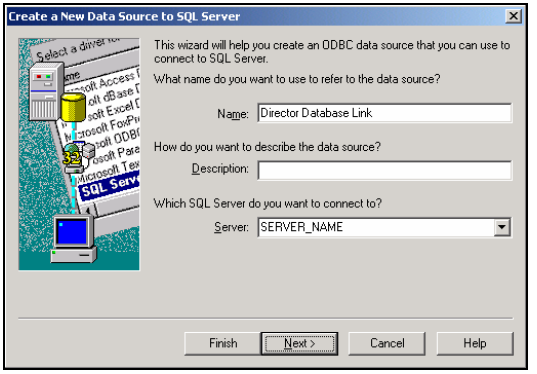

Select: **SQL Server** in the list, and click **[ Next ]**.

**8)** In the next screen, click **[ Finish ]**.



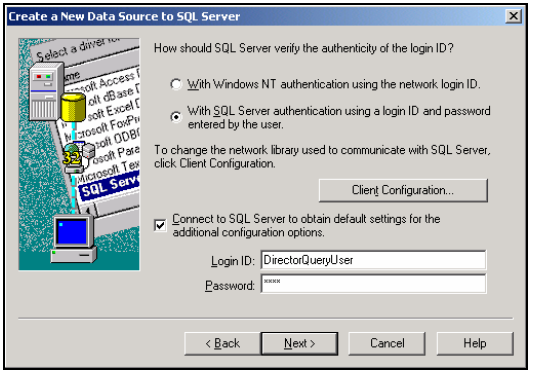
If you see any additional screens before the one shown below, respond appropriately ( [Next], etc.).
**Tip:** If asked to log in, enter the "DirectorQueryUser" login name and password.
**Exception:** Auto card-import tasks involving the 'ErmUserImport' and 'ErmUserImportResult' tables require the "ImportUserLogin" login name and password.

**9)** In the next screen, enter a suitable data source "Name", plus a "Description" if desired.



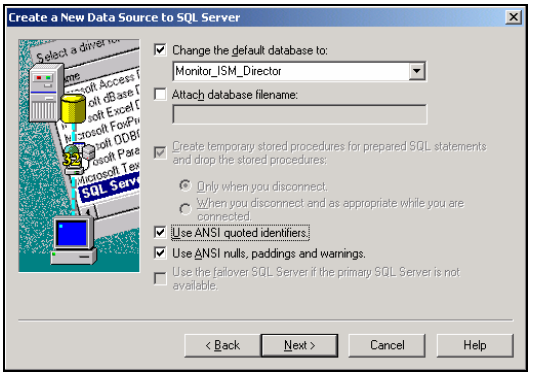

Then, select your "Server" in the list, and click **[ Next ]**.
**Tip:** This may also be (or include) the name of the PC that contains the database.

**10)** In the next screen, select "With SQL...", and "Connect to SQL..." as shown:



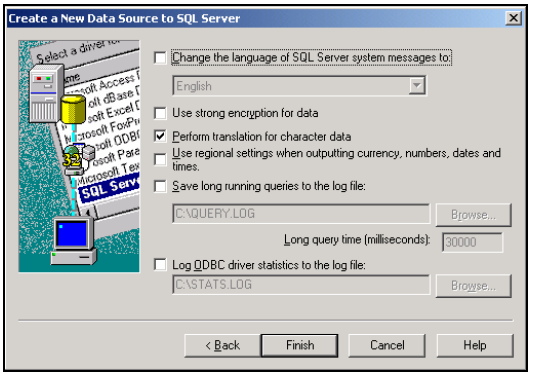

Then, enter your "DirectorQueryUser" login ID and password, and click **[ Next ]**.
**Exception**: Auto card-import tasks involving the 'ErmUserImport' and 'ErmUserImportResult' tables require the "ImportUserLogin" login name and password.

**11)** In the next screen, make selections similar to as shown:



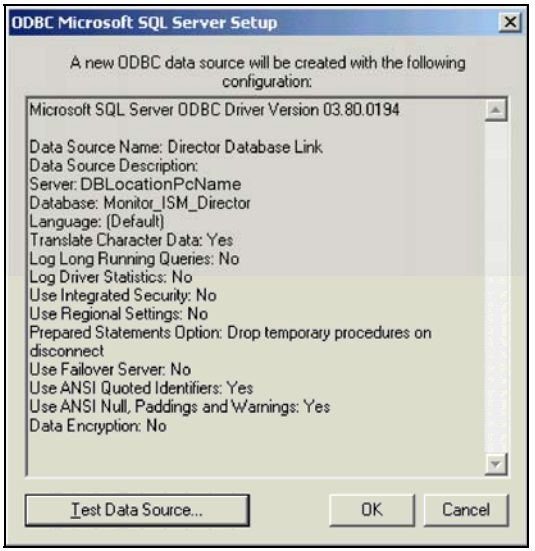

When ready, click **[ Next ]**.

**12)** And, again (almost done):



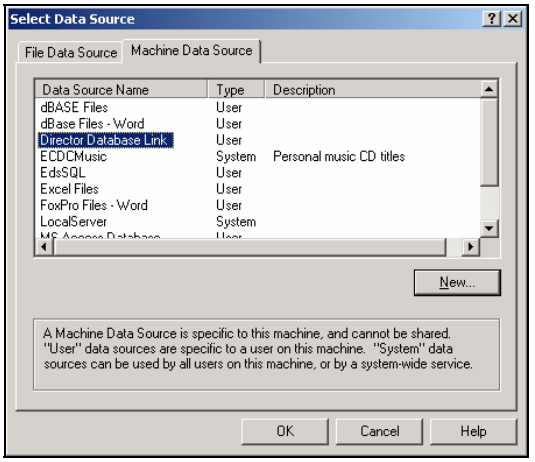

When ready, click **[ Finish ]**.

**13)** In the next screen, click **[OK]**, or **[Test Data Source]**, as desired:



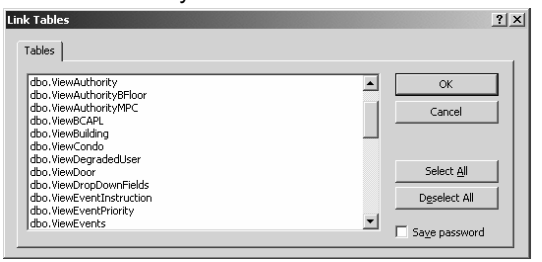

**Tip:** A successful "Test" indicates you've entered correct login data, etc.

**14)** In the next screen, select **Machine Data Source**🗀 at the top:



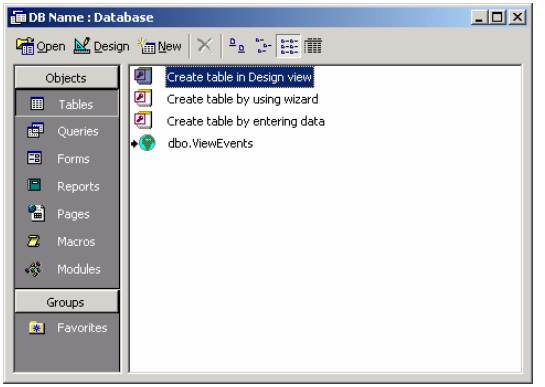

Then, select the "data source" you created, and click **[ OK ]**.

**15)** Now, select the MONITOR ISM Director database view(s) that you want to be available to you:




When ready, click **[ OK ]**.

**16)** Your selected MONITOR ISM Director database view(s) are now linked to your new database.




Now, you can apply the full power of your database software and programming skills to meet your requirements (set up database queries, etc.).

## Understanding the Data

- SID is an account identifier.
- The remaining initial columns (up to 3 or 4) comprise the "Primary Key" that uniquely identifies each row.
- For details on additional columns, refer to the specific screens in the Director software (and/or the applicable help topics).
- For more information, and details on encoded values, search your Director CD for a file pertaining to "Database Views".

# Automated User-Import (Used for: ERM Integration)

## Introduction

MONITOR ISM Director provides an automated user import feature--allowing it to be interfaced with a personnel management system (Also called: "**E**nterprise **R**esource **M**anagement"). **Caution:** This requires source data with very specific structure.

Notice: For tasks involving the 'ErmUserImport' and 'ErmUserImportResult' tables, this feature requires connecting using the "**Import**UserLogin" login name and password.

## Conceptual Aspects

- **Link/Database Query:** Allows looking at what's in the Director database (through the database 'views' provided). This is covered previously/above.
- **ErmUserImport** and **ErmUserImportResult** Tables: The ErmUserImport table can be updated by your custom software, and then polled on a regular basis (configurable) by the Director software, thus allowing user information to be updated automatically. When the information is imported, results and errors will be posted to the ErmUserImportResult table--providing feedback on how things went.

  **Note:** It is your responsibility to delete data as needed to keep this table at a manageable size.

- **Director's Automatic User Import Feature**: This allows setting up MONITOR ISM Director to automatically poll the ErmUserImport table (details to follow).

## Software Interface ("Middleware") Tasks

The ERM interface typically includes custom software that:

- Queries the database to verify present content, and/or run custom reports;
- Writes data-commands (Add/Edit/Delete) to the **ErmUserImport** table;
- Checks the **ErmUserImportResult** table for errors,
  (and deletes processed information to keep the file to a manageable size);
- Prompts an IT / system operator to fix any errors in the source data/commands.

## Required Data Format

Refer to the "Director ERM User Import" document which is included on the MONITOR ISM Director CD.

## Typical Systems (i.e., not running SQL Server)

"Query User Login" information is required to allow linking to the database. For a system set to be managed under SQL server, you will be prompted automatically for this during the installation. With a typical system (i.e., NOT using SQL server), you'll need to set this through the table repair utility.

Details / Steps: See "User-Logins" (previous).

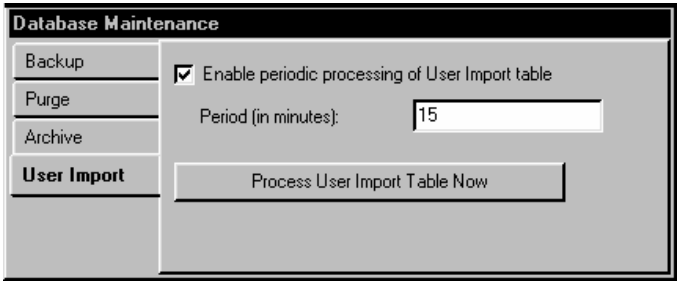
## Setting Up Automated User Imports

Notice: As a precaution before setting up this feature, ensure you have an up-to-date backup copy of the database.
For details, refer to "Backing up or Restoring the Database".

**1)** Select **[Management]** in the 'tree'.

**2)** Select **Database Maintenance**, and open **User Import**🗀.

**3)** Then, refer to the item-descriptions for this screen while making your selections.




- **Enable Periodic Processing of User Import Table:** Select this to 'turn on' the automated card import feature.
- **Period (in minutes):** This is how long Director will wait before processing the 'ErmUserImport' table again (e.g., 15 minutes = 4 times per hour);

  Note: As discussed under "Conceptual Aspects", and "Software Interface ("Middleware") Tasks" -- both previous/above, it is the responsibility of your custom software to update the table with the desired commands and data--which will then be processed by the Director software at the time intervals selected here.
- **[Process User Import Table Now]:** This causes Director to process the table right away, rather than waiting until the next scheduled time.

## Ensuring Panels are Updated

To ensure panels are updated regularly, you should set up scheduled communications sessions for the panel(s). **Tip:** For any panels that are already connected/online, the update will occur automatically. Related Topics: "Panel Communications and Updates"

# Manually Importing User-Data From a Text File

## Introduction

User data an be imported from an external file if necessary. **Caution:** This requires a source text file with very specific structure (otherwise, the database can become corrupted). As such, this feature should **not** be used by persons who are unfamiliar with computers or text file formats.

Authority: This feature requires the authority to edit users.

## Required Software Version and Licensing

This feature is supported beginning with v3.0 software. No special licensing is needed.

## Required Data Format

Refer to the "File Requirements for User Import" document which is included on the MONITOR ISM Director CD.

Note: This file is **not** associated with the automated card import feature.

## Importing Card Data Manually

**1)** As a precaution before using this feature, ensure you have an up-to-date backup copy of the database.
For details, refer to "Backing up or Restoring the Database".

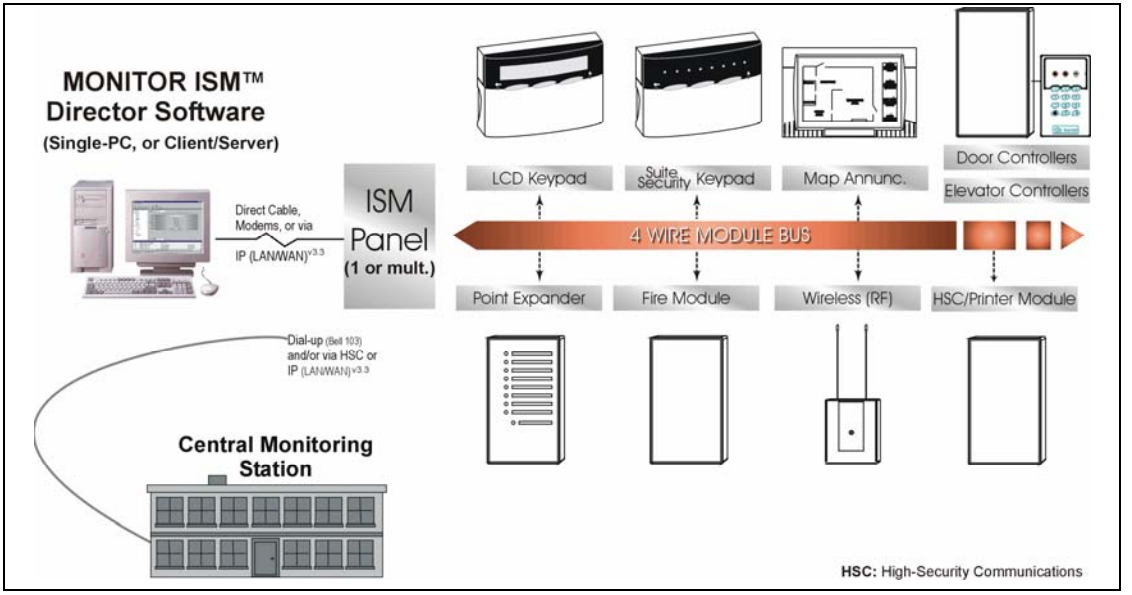
**2)** Ensure your text file matches the required structure.

**3)** Open the **File** menu, and select **Import Users**.

**4)** Locate and open your file ( **[Open]**, or double-click).

**5)** Follow any additional prompts that appear.
(If errors occur, you may need to fix your file, and import it again.)

**6)** When finished, be sure to update the panel(s) with the new data.
**Tip:** For any panels that are already connected/online, this will occur automatically.
Related Topics: "Panel Communications and Updates"




## System Design Aspects (Topology)

The following concepts can be 'mixed and matched' as desired when designing a system:

**PCs / Environments:** The MONITOR ISM Director software can be installed for use on a single-PC, or across multiple PCs in a network environment. Different aspects of the software will be installed, depending on what each PC is used for (database server, operator workstation, and/or for panel/modem connections).

Client access to the server database is protected—based on a definable list of clients, each with its associated network "IP address". Multiple central databases can also be managed if desired. An operator can logoff from one server, and then login to another one.

**Sites / Accounts:** For managing larger systems, and systems in multiple locations, the MONITOR ISM Director software uses the concept of "Accounts". Each account can be a single panel, or many panels in different locations. Essentially, an account is a set of panel(s) or site(s) that will be managed as a single entity (shared users, etc.). Accounts can be arranged in folders, which are referenced when assigning operator permissions.

Selecting an account shows the monitoring window with messages received from the specific account, and provides access to admin. and configuration topics for the selected account.

**Panels and Connections:** Each account can include 1-60 panels (subject to licensing and PC / network performance). Up to 30 panels at a time can be connected together to share a single connection to a PC or modem.

Panels can connect through any PC in the MONITOR ISM Director system. A specific connection can be direct (via cable), or using

dial up modems, or through a network (via IP). Cable connections are 'serial', with or without conversion to "RS485". (RS485 connections allow for longer distances, and/or multiple panels per connection.)

**IP Network Connections** (≥ V3.30 Director software): Setting up an IP connection is documented separately. For details, refer to the installation guide provided with the IP interface (may also be in PDF format on your Director CD).

Dial up panels with dedicated external modems (one panel per modem) can be set to automatically dial-in to the MONITOR ISM Director system to transmit alarms or blocks of activity messages. In other configurations, the alarms and events are transmitted when a connection is made with the specific panels (immediately, at a pre-programmed time, or on a repeating schedule).

Central monitoring is configured separately (for each individual panel), utilizing the 'Bell 103' (300 baud) modem/dialler built into each main panel, and/or an IP connection (SIP Reporting), or high-security communications (HSC--via Mark7/DVACS service in Canada). **Tip:** HSC modules also support a **printer**.

The built-in modems can also be used to remotely manage smaller sites (single-panel accounts with up to 300 users).

MONITOR ISM Director panel communications are managed through "Communication Pools", which allow selecting groups of modems to choose from when 'calling' a specific panel/site. Note: Communication 'pools' are used in all systems.

Initiating a connection with desired panel(s) allows a MONITOR ISM Director operator to monitor activity at an account (live/real-time), monitor guard-tours that are in effect, perform status-checking and device-control tasks, and/or synchronize panels with the software. **Note:** Panel updates can also be scheduled for regular intervals and/or 'quiet' times at the specific sites (such as overnight).

## Alarm System Hardware

Main system panels, LCD keypads, and expansion modules provide the basic building blocks for each security system. Monitoring sensors, and various output/signalling devices complete the system.

System Capacities: For an extensive list of the number and types of devices supported, refer to "System Capacities".

**Main System Panels:** This is the box or panel on the wall that acts as the brain of the system. All of the various detection devices connect to it. When a device is triggered, the control panel activates sirens or lights. If monitored, it alerts the Monitoring Station through the telephone lines (HSC or dial-up).

**Expansion Modules:** Various expansion modules are supported allowing additional monitored sensors, programmable outputs, and/or special features to be added to the system (such as door/access control, elevator/floor control, and suite security). All modules from an existing Fx or FxPro system are also supported. The system supports a total of 24 expansion modules (or 60 suite-security keypads).

**MONITOR ISM LCD Keypad:** A keypad provides users with on-site control, and the ability to operate the total alarm system. As well, LCD keypads provide an on-premise read-out indicating the location and nature of alarms.

**Suite-Security Keypad:** These units provide security features for 1 - 8 users in a single apartment/suite or facility. A suite-security keypad can be thought of as a private security system, providing intrusion monitoring and signalling features for a single suite/facility. Two types are available: 2-zone & 8-zone.

**Contacts (Door and Window sensors):** These are magnetic sensors that detect door or window openings. Contacts are normally required on exterior doors and both ground-floor and basement windows that can be opened. Upper-level doors and windows that can be reached from the roof, balcony, or 'deck' should also be protected.

**Motion Detector:** This is a device mounted strategically inside the facility to detect motion within a predetermined area. The most commonly used type is the infrared detector, which senses changes in infrared energy (temperature) related to movements within the coverage area. The coverage pattern and sensitivity of the unit can be adjusted during the installation to avoid false alarms due to pets.

**Glass Break Detector:** This is a sensor placed on a window or skylight that initiates an alarm at the moment glass is broken. This sensor 'listens' for the distinct sound of breaking glass or the feel of its vibrations. These sensors are not always necessary, however, if window contacts and/or motion detectors are used.

**Smoke Detector:** This is a smoke detector that senses smoke or flame, triggering a local alarm as well as transmitting an associated message to the monitoring station. The Monitoring Station, in turn, is able to notify the fire department on a 24-hr a day basis.

**Panic Alarm:** A panic alarm is another type of detector that can be added to a centrally monitored system. Panic buttons can be used to notify police, or other authorities as set up during installation. Panic buttons can be fixed or portable, worn around the neck or carried. This feature can provide immeasurable peace of mind for elderly or infirm persons---or anyone spending time alone in their home.

**Carbon Monoxide Sensor:** A device that detects toxic levels of carbon monoxide gas. Early warning of low levels of carbon monoxide allows preventative steps to be taken before serious harm occurs.

**Critical Points:** In addition to providing intrusion detection and peace of mind for fire and personal protection, many other conditions can be electronically supervised. For example supervising a freezer to alert someone when the temperature rises. Water and gas detectors also exist to safeguard against property damage, etc. These critical points can be monitored by a Monitoring Station 24 hours a day.

**Readers and Cards/Tokens:** Updated door-control modules are supported, providing access control (with In/Out tracking) for two doors (1 or 2 readers per door). The readers can be magnetic stripe, Wiegand, Proximity, or other readers that output in a standard magnetic stripe or Wiegand (swipe) format.

G-Prox™ readers, and the newer G-Prox II™ intelligent (jumper-free) readers and associated G-Prox™ proximity cards are fully supported. These readers are available with or without keypad, and in standard (wall/flush mount), mullion-mount, and "Arming Station" designs.

(Wiegand-output keypads allow for "Card Plus PIN" entry, and duress signalling.)

Two (definable) card formats are supported at the same time, allowing two types of Wiegand/Proximity cards to be used (per panel), or Wiegand/Prox and Magstripe/Barcode. Wiegand cards (or Wiegand output) can be the industry standard format-A 26-bit, or proprietary 36-bit format, plus user-definable Wiegand formats up to 40-bits in length. Magnetic stripe cards (or equivalent output) can be either standard magnetic stripe access cards, or custom/existing cards that meet the ISO 3554 industry standard (user-definable formats).

Cards with 'version numbers' are also supported, allowing fixed-ID cards to be reissued if lost or stolen.

"Matrix" style reader-keypads (i.e., that require additional wiring for the keypad) are supported only via converted PDC and TDC door controllers.

# Desktop Reference

## The Desktop

### Your 'Window' to the System

The desktop is your interface to the MONITOR ISM Director software, providing a familiar Windows 'look and feel', with access to all features and items assigned to you as a MONITOR ISM Director operator.

The MONITOR ISM Director interface can be set as desired by each individual operator. This includes whether they prefer the MyTools bar, or the Tree window, plus the sizing of the desktop sections, and other settings.

### Selecting Desktop Items to be Displayed

The **[Tree]**, **[MyTools]** and **[Events]** buttons on the toolbar allow viewing or hiding different aspects of the desktop (try it!).

Your MyTools Bar: You can customize the look and content of the MyTools bar to your own preferences. For details, refer to "Customizing the MyTools Bar".

Account-Folders: For systems with single-account licensing, only one account will appear in the tree. In larger systems, **[Account Folders]** will be shown in the tree for operators with multi-account permissions (or that have the authority to edit account folders).

### Saving Your Desktop Settings

After changing an aspect of the desktop (the sizing, Forms/Grid mode, and/or which aspects are to be displayed, you can save your changes so the desktop appears in the same format the next time you login. To save your changes, open the **View** menu, select **Desktop Settings**, and then **Save**.

**Tip:** You will also be asked if you want to save your changes whenever you logout or exit from the software.

### Navigating the Desktop

Many screens are divided into 'tabs' of related settings. (Start with the 'Standard' tab, and look in any additional tabs that are of interest to you.) Some screens also include the familiar windows ‘scroll-bars’ whenever an item is too large to fit on-screen.

### Changing the Size of the Desktop

To resize the entire desktop, click and drag the bottom right corner to the desired position. (If the screen is presently 'maximized', you'll first need to double-click the blue title-bar, or click the middle button in the upper right corner of the screen.)

To ‘maximize’ the desktop, double-click the blue title-bar, or click the middle button in the upper right corner of the screen.

### Changing Proportions of Desktop Areas

To change the proportion of the desktop, move the mouse to the edge of a screen area (such as between the 'tree' and forms/grid area), and watch for the cursor to change shape. Then, click-and-drag the edge of the window to a new location.

**Tip:** You can also **maximize** the form/grid area, or the monitoring window (i.e., cause it to fill the entire screen) by double-clicking the title-bar for the specific window **twice**. (Also see "Resetting...", to follow.)

### Changing the Position of Desktop Items

Each portion of the desktop can be repositioned, and/or viewed on its own. This is especially useful on a multi-monitor PC, allowing an item such as the monitoring window to be viewed separately.

To relocate an item, 'drag-and-drop' the item by its title-bar, while watching for the greyed box indicating the new position.

To view an item 'full-screen' (such as the monitoring window), double-click its title-bar twice. To access the main desktop screen again, double-click the title-bar once again.

## Resetting the Desktop

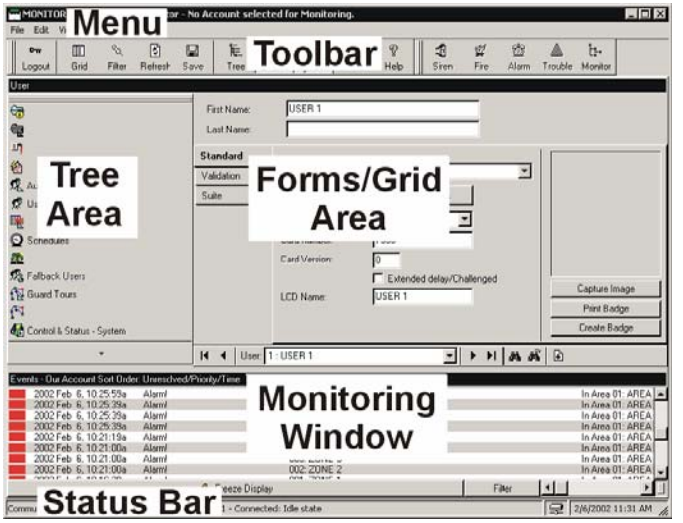
After moving and resizing areas of the screen, you may wish to reset the desktop to either your last saved settings, or to the initial factory default layout.

Last Saved Settings: Click **Reset** on the toolbar (or open the **View** menu, and select **Desktop Settings**, and **Reset**).

Factory-Default Layout: Open the **View** menu, and select **Desktop Settings**, and **Default**).

**Tip:** If a window or portion of the desktop is presently "maximized" (fills the entire screen), you'll need to double-click its title-bar to access the menu or toolbar.

**Note:** If your desktop was accidentally **saved** with the monitoring window 'undocked' and hidden behind the main desktop, follow the preceding steps for "Factory Default Layout".




- **The Menu:** Provides access to some miscellaneous features of the MONITOR ISM Director software. **Tip:** The **Tools** menu provides access to Wizards that simplify setting up a new system, and/or enabling communications with a panel.
- **The Toolbar:** Provides access to some common tasks.
- **The 'Tree'** (optional)**:** This is an expandable/ collapsible outline that allows selecting an account, and provides access to most topics including system configuration, management, and status & control. Click **[Tree]** on the toolbar to view or hide the 'tree'.
- **The 'MyTools' Bar** (optional)**:** This is a customizable list of tasks/items that can be used as alternative to the 'tree'.
  Click **[MyTools]** on the toolbar to view or hide the MyTools list/bar.

  Tip: You can customize the look and content of the MyTools bar when you are logged in (View ⇨ MyTools ⇨ Customize). For details, refer to "Customizing the MyTools Bar".

  MyTools Doesn't Work: If you select **[ MyTools ]**, and only a small empty 'button' appears, this means no items are assigned to the 'MyTools' bar. See the previous tip to fix this.
- **The Forms/Grid Area:** This area shows details on your present topic (as selected from the tree or MyTools bar). This can be set for either a forms view (typical / data entry), or 'grid' format (experienced persons / viewing and sorting lists).
  (Use the Form / Grid button on the toolbar to switch views.)
- **The Monitoring Window** (optional)**:** This area shows recent events that have been received (for a selected account).
  Click **[Events]** on the toolbar to view or hide the monitoring window.

  Multi-Account Systems: With multiple accounts, the monitoring window shows the events for your present account. (Select **[Account Folders]** in the tree, then locate and double-click your desired account.)

  To set the account to be monitored by the status toolbar, click **[Monitor]** on the far-right end of the toolbar.
- **The Status Bar:** This area (at the extreme bottom of your desktop) shows whether or not you are connected with a selected account (i.e., associated panels), plus other communications-related status messages.

# The Menu

## The Main Menu

The menu provides access to miscellaneous and maintenance tasks.

## Opening a Menu & Selecting an Item

To select an item from a menu, simply click the menu item to 'open' that topic, and then select the desired item from the list.

**Tip:** Edit menu selections are generally also available by 'right-clicking' an item, or a blank portion of a form.

---

## File

- **Login / Logout:** Allows an operator to access their assigned tasks/features of this software, and to block unauthorized access to those features when they are finished.
- **Change Password:** Provides an easy method for the operator who is presently logged in to change their login password.
- **Import Users:** Allows importing a card database from an external text file (very specific formatting requirements).

  For more information, refer to "Manually Importing User-Data From a Text File".
- **Exit:** Allows shutting down the MONITOR ISM Director software.

  **Note:** In a client-server system, the communications (or server) software must be shut down separately. In a single-PC system, these modules can optionally be started and shut down automatically.

  For details, refer to "Setting Communications to AutoStart When an Operator Logs In".

## Edit (most of these selections are also available when you right-click a specific item--typically in the 'tree')

- **Cut:** Copies all settings for a selected item, and then deletes the original item.
- **Copy:** Copies all settings for a selected item.
- **Paste:** Pastes settings that had been copied (or 'cut') from another item.
- **Delete / (Disconnect):** Allows deleting a selected item. Exception: When working with a panel communications session ("Pending/Online"), this ends the selected session.

---

- **Add Account Folder:** For a multi-account system, this allows creating a new folder for organizing your accounts.

  This selection is available in the **Edit** menu when you have an account folder selected in the **[Account Folders]** portion of the 'tree'.

  **Tip:** Account folders are referenced by "operator permissions" to determine which accounts will be available to each operator. Be sure to set up your folders with this in mind. To set up operator permissions, refer to "Operator Permissions".
- **Add Account:** For a multi-account system, this allows creating a new account pertaining to a panel, site, or company.

  This is available when you have an account folder selected in the **[Account Folders]** portion of the 'tree'.

---

- **Add New:** Allows setting up a new item of the type associated with your present topic (schedule, user, etc.).
- **Add Panel Group:** This allows creating a '"Panel Group" which allows setting up communications for a panel, or a group of panels that are sharing a modem or direct-cable-connection.

  This item is available in the **Edit** menu when you are 'in' the 'Configuration' branch of the 'tree' for a specific account. To set up panel groups, refer to "Panels, Panel Groups, and Related Settings".
- **Add Panel:** This allows adding a new panel to your system, or to any specific account.

---

- **Find:** This allows searching for an item of the type associated with your present topic (User, Door, etc.).
- **Find Next:** This allows searching for additional items that match your entered characters (e.g., **nam*** ).

---

- **Resolve All:** Allows entering a comment for all displayed alarm messages, and setting them all as being 'resolved'.

## View

- **Toggle Form / Grid:** Allows switching between showing either the settings for one item at a time (forms view), or a list of defined items with their associated settings in a table-format (grid view).

  **Tip:** You will likely use 'Forms' view most of the time. It is best suited for entering or viewing settings for items. Grid view is used less often, but is useful for viewing and sorting lists (such as users).

- **Filter Undefined Rows:** Allows hiding or showing 'yet to be defined' items (templates) used when setting up new items (as an alternative to right-clicking the screen & selecting **Add New**).

- **Desktop Settings:** This allows restoring the desktop to your last saved settings (**Reset**), saving your present desktop layout (**Save**), or reverting to the original factory layout (**Default**).

- **Logical Tree View:** Allows toggling the 'tree' to show items on a panel-by-panel basis ( ✗ ) versus in a single list ( ✓ ).

  This item is available when you are 'in' the portion of the tree for a specific account. This is useful for systems with more than one main panel. (Affects the configuration and status/control tasks).

  **Tip:** For details on "Logical Tree View", refer to the "Other Desktop Choices" section (to follow / below).

- **Panel Information:** When using the 'logical tree view' for configuration and status/control tasks (see previous item), this selection causes panel and panel-group references to appear at the bottom of each screen as a navigational aide.

  This item is available only when a "Control & Status" or "Configuration" topic is selected in the 'tree', while 'Logical Tree View' is in effect. **Tip:** For more information on these settings, refer to the "Other Desktop Choices" section (to follow / below).

---

- **Refresh (Cancel):** In general, this 'cancels' unsaved changes in the present screen, and reverts to the previous settings. In the 'grid' view, this also removes column 'filtering' to list all items.

- **Save:** Allows saving settings for an item while you are still working in the 'form' for that item. (When you exit from a form by selecting any other item on the desktop, your settings are saved automatically.)

---

- **Change Monitor Account:** This allows selecting an account to be monitored by the status toolbar (when each specific operator is logged in). This is the same as clicking **[Monitor]** on the toolbar.

  **Tip:** This is set automatically for a single-account system. Note: The status toolbar can monitor one specific account at a time, and is available only when the MONITOR ISM Director software is 'connected' with the specific account being monitored.

- **Show Tree Window:** This shows or hides the 'tree' portion of the desktop (a structured outline of tasks/items). This is the same as clicking **[Tree]** on the toolbar.

- **Show Event Window:** This shows or hides the event-monitoring window. This is the same as clicking **[Events]** on the toolbar.

- **MyTools:** This provides selections to show / hide the 'MyTools' bar (a customizable list of tasks/items), or to customize the look or content of the MyTools bar. Selecting **Show** is the same as clicking **[MyTools]** on the toolbar.

  For details on customizing the MyTools bar (for when each specific operator is logged in), refer to "Customizing the MyTools Bar".

- **Photo Verification:** This allows turning the photo verification feature on or off, customizing how it will operate, or manually opening the photo window (same as clicking **[Show Photo]** at the bottom of the monitoring window);

  For details, refer to "Visually Verifying Users (Photo-Verification)".

## Tools

- **Configuration Wizard** (≥ **V4.0**)**:** This feature provides an easy way to go through the process of setting up a new system.
- **Communication Wizard** (≥ **V4.0**)**:** This feature provides an easy way to set up communications with your panels.
- **Options:** This screen will contain one of the following topics (depending on software licensing):

  🗀 **Panel Communications** 🗀**:** This allows enabling or disabling the "Auto-Start/Stop Panel Communications" feature for systems with single-PC licensing. Related Topic: "Setting Communications to AutoStart When an Operator Logs In"

  🗀 **Visual Director** 🗀**:** Provides various camera-image quality settings to allow for slower connection speeds and reduced-bandwidth applications. Tip: If multiple accounts, 'open' the account first. Related Topic: "Adjusting Camera Quality for your Connection/Bandwidth"
- **Who Is Logged In:** In a client-server system, this selection allows checking for other operator workstations that may be connected to the database.

  **Note:** This is useful when performing database maintenance tasks, since other operators and PCs cannot be connected to the database.

  For details on database maintenance, refer to "System Maintenance Tasks".
- **Check Database for Conflicts** (≥ **V3.3**)**:** This shows a list of conflicts between the software database, and settings stored at individual sites/panels.

  This feature is especially useful for large systems that may communicate infrequently with individual sites, where panels can become out of sync with the software database. **Note:** Listed items pertain to the topic/form that contains a conflict, and the ID number of the specific **account** (NOT the item/user ID).

  For details on using this feature, look up "Check Database for Conflicts" in the index.

## Help

- **Topics:** This provides an alternative method for launching the on-line help.

  **Tip:** Pressing the **F1** key, or clicking **Help** on the toolbar will bring you directly to the topic associated with your present screen.
- **Language:** This allows selecting a different on-line help language (for your current work-session).

  Operator Default: The on-line help will appear in the language associated with your operator settings.

  ***Language***: The on-line help will appear with common end-user tasks in the indicated language.

  **Tip:** To set the "Operator Default" language (which is also the language that the software will appear in for each specific operator), refer to "Operators (People Who Can Use this Software").
- **About...:** This provides information on your version of MONITOR ISM Director software, plus software licensing, and "Cyclic ID".

  The "**Cyclic ID**" allows identifying authorized workstations to the database server (in client-server systems). For details, refer to "Client Workstation Access and Permissions".

  For topics pertaining to software capacities and licensing, refer to "Software Activation and Licensing", "System Capacities", and "Account-Wide Panel Settings".

# The Toolbar

**(Main Toolbar)**

## About the Toolbar

The toolbar provides quick-access to a number of common tasks.

To select an item on the toolbar, simply use your mouse to 'click' the desired item.

- **Login / Logout:** Allows an operator to access their assigned tasks/features of this software, and to block unauthorized access to those features when they are finished.

  **Multi-Server Login:** You can select up to 6 servers for simultaneous login. This allows listing and selecting accounts from any of the server PCs without having to log out in between. Use semicolons (;) to separate multiple server names, or click **[...]**.

  Related Topics: Startup and Logging In
  Working with Accounts and Folders

- **Grid / Form:** Allows switching between showing either the settings for one item at a time (forms view), or a list of defined items with their associated settings in a table-format (grid view).

  **Tip:** You will likely use 'Forms' view most of the time. It is best suited for entering or viewing settings for items. Grid view is used less often, but is useful for viewing and sorting lists (such as users).

- **Filter:** Allows hiding or showing 'yet to be defined' items (templates) used when setting up new items (as an alternative to selecting **Add New**).

- **Refresh / Cancel:** In general, this 'cancels' unsaved changes in the present screen, and reverts to the previous settings. In the 'grid' view, this also removes column 'filtering' to list all items.

- **Save:** Allows saving settings for an item while you are still working in the 'form' for that item. (When you exit from a form by selecting any other item on the desktop, your settings are saved automatically.)

- **Tree:** This shows or hides the 'tree' portion of the desktop (a structured outline of tasks/items). This is the same as clicking **[Tree]** on the toolbar.

- **Events:** This shows or hides the event-monitoring window. This is the same as clicking **[Events]** on the toolbar.

- **MyTools:** This shows or hides the 'MyTools' bar (a customizable list of tasks/items). This is the same as clicking **[MyTools]** on the toolbar.

  For details on customizing the MyTools bar (for when each specific operator is logged in), refer to "Customizing the MyTools Bar".

- **Reset:** This restores the 'desktop' to your last saved layout.

  **Tip:** "Desktop Settings" from the **View** menu provides additional selections to save your present desktop settings (**Save**), or to revert to the original factory layout (**Default**).

- **Help:** Opens the on-line help at the topic pertaining to your present screen or item selection. This is the same as pressing **F1** on your keyboard.

## (Status Toolbar)

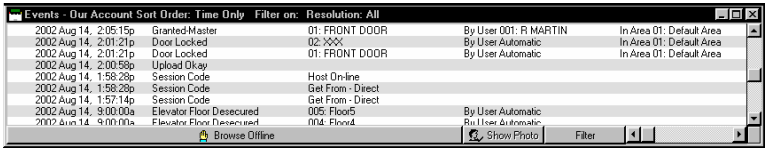
The status toolbar can monitor one specific account at a time, and is available only when the MONITOR ISM Director software is 'connected' with the specific account being monitored.

- **Siren:** This button is shown in colour (and with a 'siren' sound) if any inputs set to trigger a 'siren' or 'sonalert' have been 'tripped' in an armed area (unless the alarm has been silenced). Clicking this button displays the Area status screen, allowing you to identify the alarm quickly.
- **Fire:** This button is shown in colour if any "fire" inputs have been 'tripped' (e.g., by a smoke, fire, or CO detector). Clicking this button displays the Area status screen, allowing you to quickly identify the area that may need to be evacuated.
- **Alarm:** This button is shown in colour if any input points (monitoring sensors) have been 'tripped' in an armed area. Clicking this button displays the Area status screen, allowing you to identify the alarm quickly.
- **Trouble:** This button is shown in colour if any 'equipment' conditions are active (i.e., panel or module in trouble). Clicking this button displays the Equipment status screen, allowing you to locate the problem quickly. If the 'trouble' button is flashing, this indicates that a panel AC-failure is in effect.
- **Monitor:** This allows selecting an account to be monitored by the status toolbar (when each specific operator is logged in).

  **Tip:** This is set automatically for a single-account system.

  **Note:** This selection is also available as "Change Monitor Account" from the **View** menu.

# The Monitoring Window and Status Bar




## The Monitoring Window

The Monitoring window near the bottom of the MONITOR ISM Director desktop shows the events that have been received when you select a specific account.

**Tip:** For real-time updates, you must also be 'connected' with the specific panel(s).

## Showing or Hiding the Monitoring Window

To show or hide the monitoring window, click **[Events]** on the toolbar.

To save the desktop in its new layout, open the **View** menu, select **Desktop Settings**, and then **Save**.

**Tip:** You will also be asked if you want to save your changes whenever you logout or exit from the software.

**Note:** If the monitoring window does not open, click **[Reset]** on the toolbar (and click **[Events]** again if necessary). If your desktop was accidentally saved with the monitoring window 'undocked' and hidden behind the main desktop, open the **View** menu, select **Desktop Settings**, and then **Default**.

## The Status-Bar

The status bar at the extreme bottom of the desktop shows whether or not the MONITOR ISM Director software is connected with your selected account, plus whether or not a database update or transfer is presently in progress.

For more information on the monitoring window and status-bar, refer to the section entitled "Monitoring System Activity".

# The Tree Area (and 'right-click' menu)

## About the Tree Area

The tree area is the most powerful aspect of the MONITOR ISM Director interface--providing a simple way to select an account, and move between available topics.

## Showing or Hiding the Tree Area

To show or hide the 'tree' portion of the desktop, click **[Tree]** on the toolbar.

To save the desktop in its new layout, open the **View** menu, select **Desktop Settings**, and then **Save**.

**Tip:** You will also be asked if you want to save your changes whenever you logout or exit from the software.

## Selecting Items in the Tree

The tree has four main topics: **[Management]**, **[YourAccount]** (and/or **[Account Folders]** ), **[Communications]**, and **[Reports]**. To view an area of the tree, you must first select one of these main topics.

**[Account Folders]** appears only for systems with multi-account licensing (or for operators with the authority to edit account folders).

Then, to 'open' or 'close' 'branch' in the tree (i.e., show or hide sub-topics), click the '**+**' to the left of a topic, or double-click the topic itself.

To select a topic in the 'tree', simply click on the desired item.

## Selecting an Account

Click your site/account button in the tree.

(Multi-**Account** Systems: Click **[Account Folders]** in the 'tree', and locate and double-click the desired account.)

The tree will show the topics for the specific site/account.

## Right-clicking in the Tree

Right-clicking an account or account folder in the tree provides many selections for adding, deleting, and renaming, in addition to changing various aspects of how the tree will be displayed.

**Tips:** Selections from the right-click menu are generally available from the **Edit** menu as well.

## 'Logical' and 'Panel-by-Panel' View Modes

After selecting an account (double-click), you can right-click an item to allow changing the tree between showing a single list (logical tree view) versus showing items on a panel-by-panel basis.

This is useful for systems with more than one main panel. (This mainly affects the "Configuration" and "Control & Status" topics.)

For details on this feature, refer to the "Other Desktop Choices" section, to follow.

## Server (if multi-server login)

- **Servers:** If logged into multiple servers, this allows viewing and selecting accounts across any of the servers, or viewing accounts for a specific server.

  Related Topics: Startup and Logging In
  Working with Accounts and Folders

## Management

- **Operator:** This allows setting up persons who will be able to use this software (i.e., operators), and specifying which account folders* and features each one will be able to access (**Operator Permissions**).

  * Account folders pertain to multi-account systems only.

  **Scheduled event filters** can also be set up to customize the types of messages each operator will be able to see during vs. outside of specific times.

- **Database Maintenance:** This allows performing various maintenance tasks such as keeping the activity logs to a manageable size (purging), and copying the database (making a 'backup') to protect against hard-drive failure or other catastrophe.

  Beginning with Director **v4.10**, the auto-user import feature can be set up here as well (for interfacing with an ERM system). Related Topics: "Automated User-Import (ERM Integration)"

- **PC Client:** For a multi-PC installation (client/server operation), this allows specifying the operator workstations that will be allowed to access the central database, and the specific features that will be accessible through each client PC (by operators who also have the required permissions).

  Related: [Management] ⇨Operator ⇨**Operator Permissions**.

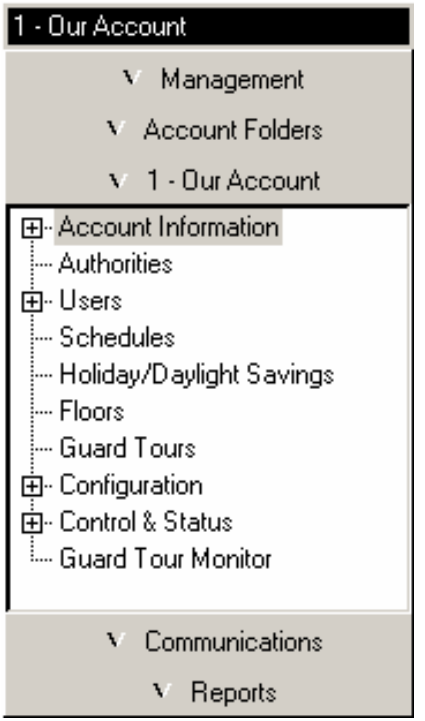
  Note: You must first obtain a "**Cyclic-ID**" code from the MONITOR ISM Director (and communications) software running on each client PC. (Select **About...** under **Help** or through the right-click menu).

- **Sound:** Allows setting up sounds that can be associated with specific events/alarms.

  Related: Account Information ⇨**Event Priority**.

- **Shared Groups:** Allows setting up groups of users and holidays that can be assigned to multiple accounts.

  Related: "Users and Holidays Shared Across Multiple Accounts".




## Account Folders (multi-account systems)

- **Shared Groups:** This area allows working with users and holidays that are shared across multiple accounts.

  Related: "Users and Holidays Shared Across Multiple Accounts".

- (**Account folders and accounts):** These appear as set up for your system, with all topics available for each account. This is where you select an account to access any of the topics in the next section.

## OurAccount (your selected or only Account)

- **Account Information:** Various account-wide settings including "Feature Set" (which determines system capacities). Also allows setting up "Bad Card/PIN tracking".

  Event Priority: Allows customizing how events will be displayed, and assigning custom sounds, etc.

  Event Instruction: Allows setting up instructions to be associated with specific event/alarm messages.

- **Authority:** Allows selecting the areas and features that groups of users will have access to. Four area-feature 'profiles' can be set up within each authority. Once defined, authorities

are then assigned to the users as desired. Exception: Suite-security authorities are defined under "User" (see next item).

- **Users:** These are the persons who will have authority to enter specific doors in the facility, use system (LCD) keypads, and/or who will have access to a specific suite/facility. **Note:** User settings also determine which "Control and Status" features will be available to each workstation "Operator".
  - **Custom Fields:** Up to 20 custom information categories for users (such as department, position, etc.). These can be used in sorting and/or filtering a list of users (In Grid View), and can be referenced by "Time and Attendance" and activity reports
  - **Shared User Management:** Allows assigning groups of shared users to the present account.

    Related: "Users and Holidays Shared Across Multiple Accounts".
- **Schedules:** Weekly blocks of time that:
  - Determine when applicable users will be able to enter an area and/or access a system (LCD) keypad;
  - Allow automating many aspects of an area including unlocking and relocking doors, changing access requirements at doors, and/or having areas arm and disarm automatically at specific times.
- **Holiday/Daylight Savings:** Allows defining calendar holidays when automated/scheduled events are (typically) not to occur, plus the (optional) dates to automatically switch between standard-time and 'daylight-savings' time.
  - **Shared Holiday Management:** Allows assigning groups of shared holidays to the present account.

    Related: "Users and Holidays Shared Across Multiple Accounts".
- **Guard Tours:** Allows defining the routes that guards will follow, which can be monitored at desired times using the guard-tour monitor feature (description to follow).

  Tip: Areas can also be disarmed and re-armed automatically as the guard moves through the designated route.
- **Configuration:** An extensive list of topics that allow setting up the "Areas" and all hardware/devices in a system, including how each item will operate and/or be monitored by the system.
- **Control & Status:** Allows authorized operators to view the status or control most items in the system.

  Panel Control & Status (requires 'User' Login): Includes **"Visual Director"** (≥V4.0) providing visual status and control through customizable 'views' of maps and cameras. Individual control & status screens are also provided (by topic/device).

  User In/Out Status: Shows the current (real-time) In/Out status of each user, plus the area they are presently 'badged' into.

  Guard Tour Monitor: Allows activating and monitoring a previously defined 'guard tour' for a specific guard (user). (See the third item above.)

## Communications

- **Pending/Online:** This allows setting up communications sessions with desired panel(s), shutting down sessions, and/or checking the status of a session.

  **Tip:** Panel communications sessions either update or synchronize settings between the software and associated panels. As well, panel communications are required for updating the monitoring window, monitoring guard-tours, and checking status or controlling items.
- **Completed:** This shows a list of previous communications sessions, along with details for each one (including why a session may have failed).
- **Communication Pool:** This allows setting up panel connections when first setting up a system.

## Reports

- **Panel Configuration:** Customizable reports on programmed items and settings (all admin. and configuration topics).
- **Users:** Customizable reports on all users, or ones assigned to specific areas, departments (custom fields), etc.
- **Activity:** Issuing reports to identify various types of activity that may have occurred in the system (alarms, access granted, etc.).
- **Guard Tour:** Allows reporting on the results of a previous 'guard tour' monitoring session.
- **Time and Attendance:** Reporting on various aspects of personnel attendance and punctuality (late arrivals, hours present, etc.).
- **Audit Report:** Viewing or printing logs of panel communications sessions and/or database changes made by operators.

# The MyTools List / Bar

## About MyTools

MyTools is a list of tasks and items that can be customized as desired (for each operator). This pertains to items that can also be selected through the 'tree'.

**Note:** The items to appear in the MyTools bar, and the name and position of each item can be changed as desired for each operator. For details, refer to "Customizing the MyTools Bar".

Multi-Account Systems: First open the tree, and double-click your desired account. This will ensure that all features (that you have permission for) are available in the MyTools bar. Note: Some features also require a panel communications session to be established first. For details, refer to "Panel Communications and Updates.

## Showing or Hiding the MyTools Bar

To show or hide the MyTools list/bar, click **[MyTools]** on the toolbar.

To save the desktop in its new layout, open the **View** menu, select **Desktop Settings**, and then **Save**.

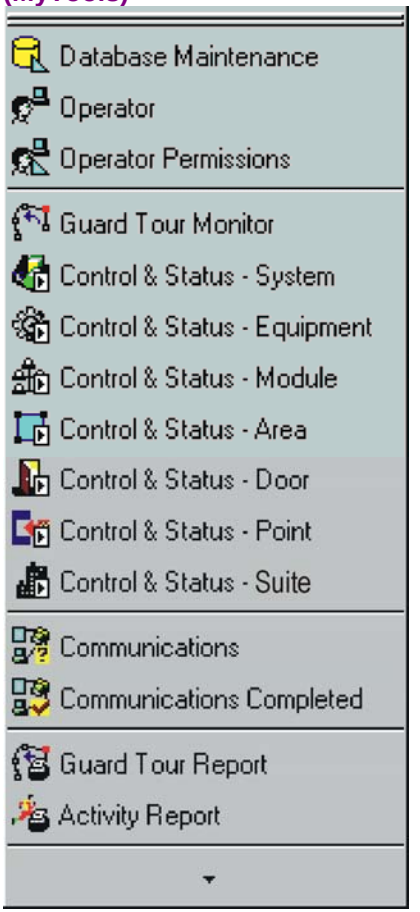
**Tip:** You will also be asked if you want to save your changes whenever you logout or exit from the software.

## Selecting an Item from the MyTools Bar

To select an item from the MyTools bar, simply scan through the list of items, and select the desired item.

**Tip:** If there are more items than will fit on your screen at one time, a button will appear at the bottom of the list to provide access to the additional selections.

**(MyTools)**




- **(List of Tasks/Items):** The MyTools area shows a list of the features and tasks that are available to the specific operator who is logged in. This pertains to items that can also be selected through the 'tree' (as described previously).

  **Tip:** If there are more items than will fit on your screen at one time, a button will appear at the bottom of the list to provide access to the additional selections.

  The items to appear in the MyTools bar, and the name and position of each item can be changed as desired for each operator. To access this feature, open the **View** menu, select **MyTools**, and then **Customize**. For more information, refer to "Customizing the MyTools Bar".

# The Forms View
(and 'right-click' menu)

## About the Forms View

After selecting an item in the 'tree', details for the item appear in the top-right area of the desktop. Clicking **Form** on the toolbar allows switching to the Forms view—which shows the settings for one item at a time.

The forms view is typically used for viewing and/or entering settings—especially for items with a lot of selections.

If "Form" is not listed on the toolbar, then you are already 'in' forms view.

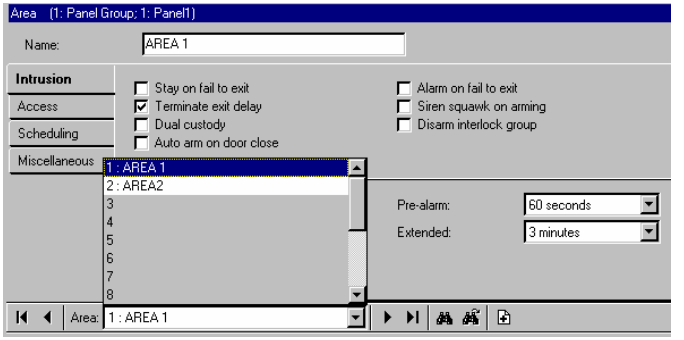
**Tip:** While 'in' the form for a specific item, many selections are generally available by right-clicking within the form.

## Working in Forms View

When using 'forms' view, you can:

- Select an item to be viewed, edited, or deleted in the 'pick-list' at the bottom of the forms window;
- Start with the 'Standard' tab, and look in any additional tabs that are of interest to you;
- To enter/change a name or number, simply select the existing value, and type-over it with the new value;
- To select or assign a pre-defined value, click either the setting itself, or the arrow on the right of the setting, and then select from the list of choices.
- For an item with a 'check-box' beside it, simply click the item or the check-box to select or deselect the item;
- When finished, select another item or topic, and your settings are saved automatically.

The Filter button on the toolbar allows hiding or showing the yet-to-be-defined items (templates). These can be selected to set up a new item (as an alternative to right-clicking the form and selecting **Add New**).




- **Settings / Selections:** Each form contains the available settings for the selected item.

  **Note:** If the selections are grey in colour, this indicates a 'template' that is available for setting up a new item (as an alternative to right-clicking the form and selecting **Add New**.

  **Tip:** You can click **Filter** on the toolbar to show or hide available 'templates'.

  **Tip:** When setting up a new item, the form will become active when you start to enter or change any settings therein.

- **Tabs** (≥V4.0)**:** Forms that include more settings than will easily fit on one screen, have been split into logical 'tabs' to make it easy to find the settings your are interested in.

- **Item-No./Name** (bottom of the forms window)**:** The bottom of the forms window includes a 'non-scrolling' section that allows selecting an item to be viewed or edited.

- **[+]:** This button allows adding a new item. This is the same as right-clicking a form and selecting **Add New**.

- **Find** and **Find Next (Binoculars):** These buttons allow searching for an item with a specific name (or the 1st few characters): Click the 'binoculars' symbol, enter your search criteria, and click **[Find]**. (Use the "*" symbol for partial name searches--e.g., nam*.)

  Users: You can search by card number, first name, or last name.

- **Right-Click Menu:** Right-clicking within a blank area on a form provides selections for deleting the item, or copying/pasting settings between items. **Tip:** These selections are also available from the **Edit** menu.

  **Tip:** To add a new item, you can click the **[+]** button, **or** right-click the screen and select **Add New**. Alternatively, you can select a blank/grey item from the list. (The new form will become active when you start entering or changing settings.)

# The Grid View
(and 'right-click' menu)

## About the Grid View

After selecting an item in the 'tree', details for the item appear in the top-right area of the desktop. Clicking **Grid** on the toolbar allows switching to the Grid view—which shows a list of items with their associated settings in a grid/table format.

The Grid view (popular with experienced operators) allows viewing and sorting a large list of items such as users, and for finding a specific item in a list (such as all users assigned a specific 'authority').

If "Grid" is not listed on the toolbar, then you are already 'in' Grid view.

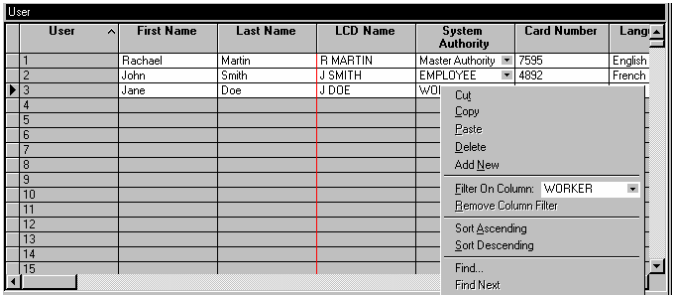
**Tip:** While 'in' the 'grid' for a specific topic, selections are typically available by right-clicking an item in the grid.

## Working in Grid View

When using 'Grid' view, you can:

- Adjust the Grid window to the desired width and height, and/or use the scroll-bars to view the available settings;
- To enter/change a name or number, simply select the existing value, and type-over it with the new value;
- To select or assign a pre-defined value, click either the setting itself, or the arrow on the right of the setting, and then select from the list of choices.
- For a 'check-box' item, simply click the check-box to select or deselect the item;
- To sort the listing on a specific column, simply click the column heading.
- To limit the listing to show only items matching a specific value, right-click within the column, enter your value under **Filter on Column**, and press **Enter**. (To 'undo' this, right-click in the column, and select **Remove Column Filter**, or simply click the **Refresh** toolbar-button);
- When finished, select another item or topic, and your settings are saved automatically.

The Filter button on the toolbar allows hiding or showing the yet-to-be-defined items (templates). These can be selected to set up a new item (as an alternative to right-clicking the form and selecting **Add New**).




- **Rows:** Rows represent individual items (doors, users, etc.) in the list, and/or 'profiles' within an item. **Tip:** A small triangle identifies the item that is presently selected.

  **Note:** Rows that are grey in colour indicate a 'template' that is available for setting up a new item (as an alternative to right-clicking the screen and selecting **Add New**. **Tip:** You can click **Filter** on the toolbar to show or hide available 'templates'.

  **Tip:** When setting up a new item, the row will become active when you start to enter or change any settings therein.

  **Note:** Rows that are grey in colour indicate 'templates' available for setting up new items (these can be shown/hidden by clicking the **Filter** toolbar-button).

- **Columns:** Each column represents a specific setting for the item (same as 'fields' in the forms view). **Tip:** You can sort the listing on a specific column by clicking the column heading.

- **Scroll-Bar(s):** For items that include a lot of settings/columns, each listing can be very wide indeed. The scroll-bars allow viewing all settings on the form without re-adjusting the desktop.

- **Right-Click Menu:** Right-clicking an item in the list provides selections for deleting the item, or copying/pasting settings between items. (These selections are also available from the **Edit** menu.)

Sorting and Filtering: Right-clicking within a specific column also allows sorting the listing based on that column, or setting the list to show only items with a specific value in that column (**Filter on Column**). This allows listing only the users or other items that meet certain criteria.

To remove 'filtering', and have all items displayed again, use the right-click "**Remove Column Filter**" selection, or click **Refresh** on the toolbar.

**Tip:** To add a new item, you can generally right-click the screen and select **Add New**, or select a blank/grey item from the list. (The new item will become active when you start entering or changing settings.)

## Other Desktop Choices

**Tip:** You can save your desktop changes at any time: Open the **View** menu, select **Desktop Settings**, & **Save**. Note: You will also be asked if you want to save your changes whenever you logout or exit from the software.

### Selecting Desktop Items to be Displayed

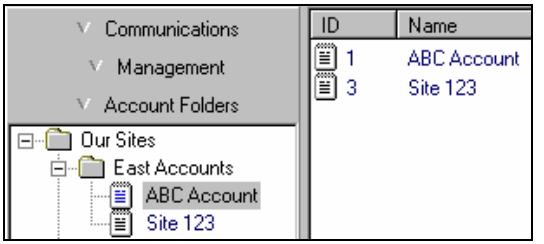
The **[Tree]**, **[MyTools]** and **[Events]** buttons on the toolbar allow viewing or hiding different aspects of the desktop (try it!).

You can customize the look and content of the MyTools bar to your own preferences . For details, refer to "Customizing the MyTools Bar".

### Setting Accounts to Appear in the Tree (Multi-Account Systems)

Account folders appear in the 'tree' (left side of your screen), while accounts are listed in the centre portion of the screen, and can optionally be set to appear in the tree as well.

**Show Accounts in Tree:**




To set accounts to appear in the 'tree', click **[Account Folders]** in the 'tree'. Then, right-click within the tree, and ensure that **Show Accounts in Tree** is selected.

**Tip:** This selection is also available in the **View** menu when you are 'in' the Account Folders portion of the tree.

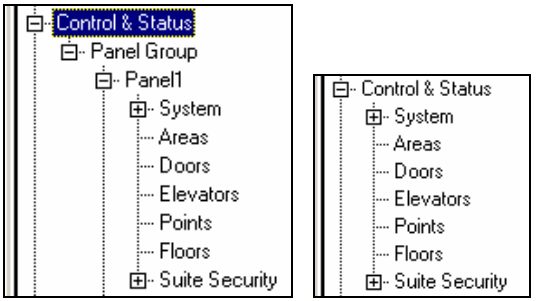
Once you access an account (double-click the account name), the tree will change to show the topics associated with that specific account (admin., configuration, and status/control topics).

### Listing Items Panel-by-Panel vs. in a Single List and Showing or Hiding Panel References in Forms

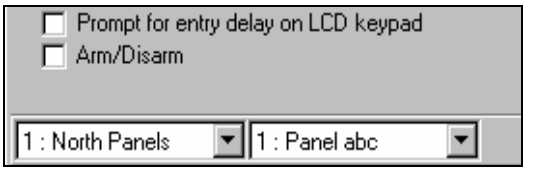
For some tasks, you have two choices as to how items will be displayed (in a single list, versus panel-by-panel), and/or whether or not panel (and panel group) references will appear in the form / grid portion of the desktop.

**Logical Tree View?**

**No** **Yes ( ✓ )**




**Show Panel/Panel Group Information:**




### Listing Configuration and Control & Status Topics in the Tree "Panel-by-Panel":

1) Click your account/site button in the tree. Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click an account.

2) Right-click a topic in the tree (or open the **View** menu), and check to ensure that **Logical Tree View** is **not** selected.

### Listing Configuration and Control & Status Topics in the Tree as a Single List:

**1)** Click your account/site button in the tree.
Multi-Account Systems: First select **[Account Folders]** in the 'tree', and double-click an account.

**2)** Right-click a topic in the tree (or open the **View** menu), and check to ensure that **Logical Tree View is** selected.

### To Show Panel References in the Forms/Grid Window

(This is available only when "Logical Tree View" is in effect.)

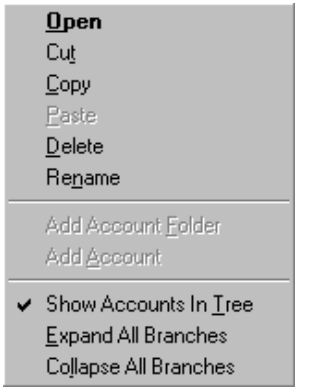
**1)** Set the tree to show items in a single list (see previous / above).

**2)** Open **Configuration** (or **Control & Status**) in the tree, and select any topic (such as "System").

**3)** From the **View** menu, select **Panel Information**, and ensure that "**Show Panel / Panel-Group Information**" is selected.
**Tip:** The "ID and Name" selection causes the name to be included in the 'Panel' and 'Group' columns when working in Grid view.

Sample screens and selection-descriptions appear on the next page.

**(Right-Click an Account or Folder)**

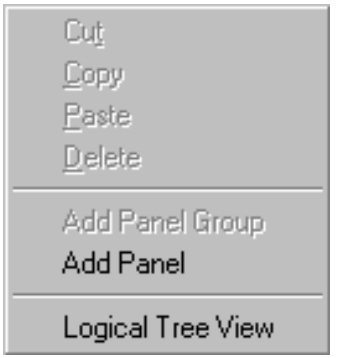



- **Show Accounts in Tree** (available in the 'Account Folders' portion of the tree)**:** 'Toggles' the tree between showing accounts along with the account folders in the tree, versus showing accounts only in the centre of the screen.

  For details on adding, renaming, and deleting accounts and account folders, refer to "Working with Accounts and Folders".

---

**(Right-Click within the Tree for an Account)**

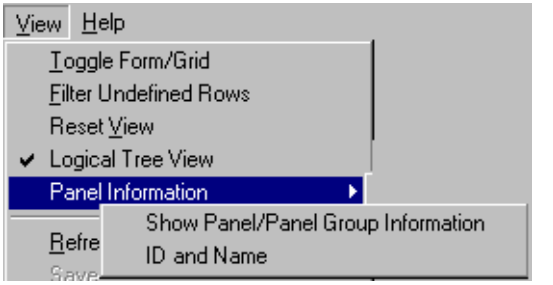



- **Logical Tree View:** 'Toggles' the tree between listing all topics for an account (√) versus listing the topics separately for each system panel (by panel group).

  **Note:** This setting mostly pertains to the "Control & Status", and "Configuration" topics.

---

**("View" menu when a Configuration or Control & Status Topic is Selected in the Tree)**




(This is available only when "Logical Tree View" is in effect.)

- **Panel Information:**
  - + Show Panel / Panel-Group Information: Identifies system panels and panel groups at the bottom of configuration forms (and in grid view);
  - + ID and Name: In conjunction with the setting above, this shows the name for each system panel and panel group (instead of ID only) when working in **Grid** view.

In **Forms** view, selecting "Show Panel / Panel-Group Information" always displays the ID **and** Name for the panels & groups. (The "ID and Name" setting has no effect when working in Forms view).

# On-Line Support & Product Information

## On-Line Information and Support

The VEREX Technology web site (http://www.verextech.com) provides access to product marketing and support information 24 hours a day, 7 days a week.

VEREX Technology provides all product data-sheets and marketing materials as Adobe® PDF files for direct download and printing. Installation instructions and user's guides for current products are also available in PDF format.

### Technical Support Web-Site

The technical support web site can be accessed through the main web site, and is also available directly under:

http://support.verextech.com (Notice: No WWW)

**http://www.verextech.com** and
**http://support.verextech.com**

The VEREX Technology web site is being updated for ease of use, and additional features.

To view or print a PDF file, you must have the Adobe® Acrobat reader software installed on your computer, and/or PDF support set up for your Internet 'browser' software. The Adobe® Acrobat reader is distributed freely, and can be downloaded from www.adobe.com.

To access the VEREX web-sites, you must have both Internet access and 'web browser' software installed and properly set up on your computer.

# Index


Absentee report ..... 20
Access ..... 32, 136, 142, 150, 222, 232, 236, 244
  Card format ..... 216
  During comms failure ..... 158, 216
  Reporting on User Access Rights (by Area, Door, or Floor) ..... 32
  User-photo verification ..... 44
Access control ..... 136, 142, 150, 158, 222, 232, 236, 244
  Card format ..... 216
  None (see token-format) ..... 216
Access settings (card format etc.) ..... 216
Access-Controlled Areas
  Understanding ..... 220
Access-Controlled Elevators (Lifts) and Associated Readers ..... 244
Account ..... 181
  Do I have to be logged in? ..... 16
  Find an account across multiple servers ..... 181
Account button on the toolbar ..... 178
Account Folders ..... 178
  Setting up ..... 178
Account Information ..... 194, 197, 198, 202
  Account Type, Feature-Set, etc. ..... 194
  Alarm / Event Instructions ..... 198
  Alarm / Event Priorities ..... 202
  Bad card/PIN tracking ..... 196
  Event Response ..... 197
  Site/Mailing Address and Contact Information ..... 196
Account Information (Custom Information Categories for Users) ..... 148
Account list ..... 178
  Sorting ..... 178
Account UID (see Panel Code) ..... 212
Accounts ..... 178, 181, 346
  Introduction ..... 346
  Setting up ..... 178
  Viewing accounts across multiple servers ..... 181
Account-Wide Panel Settings (Feature-Set, etc.) ..... 194
Acknowledge and/or resolve an alarm ..... 43
Activating and Monitoring Guard Tours ..... 106
Activating Communications and Transferring Panel Settings ..... 114
Activating views (for DB query) ..... 326
Activation key ..... 286, 320
Activity
  Monitoring system activity ..... 39
  Reporting on activity for an account ..... 26
Activity reporting ..... 26
  Import archived data to report on ..... 172
Activity window ..... 345
Adding ..... 130, 136, 142, 150, 178, 260
  Activating a Pseudo-point ..... 218
  An account folder ..... 178
  Areas ..... 222
  Authorities for users/entrants ..... 142
  Cardholders/entrants ..... 150
  Doors ..... 236
  Elevators (lifts) ..... 244
  Expansion modules ..... 228
  Holidays ..... 140
  Input-points / sensors ..... 252
  Operators ..... 126
  Programmable output points ..... 260
  Required-attendance periods ..... 24
  Schedules ..... 136
  Set up operator permissions ..... 130
  Setting up a panel communications session 114
  Users ..... 150
  Users who can enter during comms-failure ..... 158
Adding features ..... 286
Address ..... 196
  Mailing address for an account ..... 196
Adjusting Camera Quality for your Connection/Bandwidth ..... 60
Administrator
  Windows Administrator ..... 275
Advanced Camera Settings ..... 69
Advanced Database Features ..... 325
After a Multi-Server Login ..... 181
Aim or zoom a PTZ camera ..... 57
Alarm ..... 39
  Checking status for the system or various items ..... 70
Alarm instructions ..... 198
Alarm notes ..... 43
Alarm priorities ..... 202
Alarm reporting (transmission mode paging etc.) ..... 212
Alarm reporting settings ..... 212
Alarm window ..... 345
Alarms ..... 39, 134
  Acknowledge/resolve ..... 43
  Listing only specific messages ..... 42
  Scheduled event filtering for operators ..... 134

Alarms (blocking unwanted alarms from 'pseudos') ..... 218
Allow duress ..... 194
Antipassback status ..... 91
  Resetting for one user or everyone ..... 76
  Resetting for users in a specific area ..... 91
Apartment ..... 232
  Suite-Security Keypads ..... 232
APB Reset for an area ..... 91
APB status ..... 91
  Reset for users in a specific area ..... 91
  Resetting for one user or everyone ..... 76
Archive ..... 172
Archiving Activity or Audit logs ..... 172
Area settings ..... 222
Area Users ..... 89
Areas
  Area Users (Activity¸ User Count¸ and APB-Reset) ..... 89
  Check status by area ..... 86
  Duplicated numbers (see display offsets) ... 208
  Overview ..... 220
Areas and Related Settings ..... 222
Arm an area ..... 86
Arm-disarm keyswitch (setting up custom input point types) ..... 257
Arrival/departure reports ..... 20
Attendance ..... 20
  Time and attendance reporting ..... 20
Attendance periods (for time and attendance reports) ..... 24
Attendance zone ..... 240
Audit report ..... 36
Audit Reporting
  Import archived data to report on ..... 172
Authorities
  Overview ..... 220
Authorities for shared users ..... 184, 185
Authorities for users / Entrants ..... 142
Authority levels ..... 142
Authority ranges for shared users ..... 187
Auto-connect to panel (see Auto-Connect under 2nd screen) ..... 114
Auto-login to control and status ..... 126
Automated user/card import ..... 332
Automatic door unlocking ..... 239
Automatically starting panel communications when an operator logs in ..... 122
Backing up or Restoring the Database ..... 166
Bad Card/PIN ..... 78
  Clearing a global lockout ..... 78
Bad card/PIN tracking ..... 196
Badging cards ..... 154
Badging option (using) ..... 154
Bandwidth ..... 60
bCAPL ..... 102
  Control and Status of Outputs ..... 102
bCAPL (programmable output points) ..... 260
bCAPL outputs
  Duplicated numbers (see display offsets) .... 208
Browsing ..... 357
  VEREX Technology on the Web ..... 357
Cable connection support ..... 300
Camera quality ..... 60
Camera Status/Control and Adjustments ..... 56
Camera views (for event-triggered cameras) .... 69
Camera-image ..... 59
  Maximum size ..... 59
Camera-Image Settings ..... 60
Cameras ..... 64
  Initial set up ..... 64
  Monitoring remote cameras ..... 48
Capacities ..... 194
  Activating or updating your software ..... 286
  Maximum system capacities ..... 320
  Set panel feature-set ..... 194
Capturing user photos ..... 154
Card access ..... 236, 244
Card action (card enable/disable reader) ..... 241
Card badging option (using) ..... 154
Card disabling reader (Card Action) ..... 241
Card enabling reader (Card Action) ..... 241
Card format settings ..... 216
Card import (automated) ..... 332
Cardholders (users/entrants) ..... 150
Cardholders / panel users ..... 150
Central monitoring via IP (LAN/WAN) ..... 298
Change Monitor Account ..... 73
Change Server ..... 306
Changes
  Updating system panels ..... 112
Changing settings for ..... 130, 136, 142, 228, 260
  An account folder (renaming) ..... 178
  Areas ..... 222
  Authorities for users/entrants ..... 142
  Cardholders/entrants ..... 150
  Custom input point types ..... 257
  Daylight-savings date ..... 140
  Doors ..... 236
  Editing a panel communications session ..... 114
  Elevators (lifts) and associated readers ..... 244
  Equipment (pseudo-points) ..... 218
  Expansion modules ..... 228
  Global access-control settings ..... 216

Holidays ..... 140
Input-points / sensors ..... 252
Login password ..... 128
Monitoring paging & remote management ..... 212
Operator password for logging in ..... 128
Operator permission assignment ..... 126
Operator permissions ..... 130
Operators ..... 126
Paging feature ..... 260
Programmable output points ..... 260
Required-attendance periods ..... 24
Schedules ..... 136
Standard-time date ..... 140
System settings for each main panel ..... 210
Updating panels ..... 112
Users ..... 150
Users who can enter during comms-failure ..... 158
Changing the look of your desktop ..... 354
Changing the MONITOR ISM Director-server PC ..... 280
Check Database for Conflicts ..... 162
Checking Camera/PTZ Connection Status ..... 58
Checking or Synchronizing the panel Date & Time ..... 74
Checking Panel Status (Monitored Conditions) 80
Checking status for the system or various items ..... 70
Checking Status or Controlling Elevators ..... 96
Checking Status or Controlling Floors ..... 98
Checking Status or Controlling Outputs (Electronically switched Devices) ..... 102
Checking the Status of Modules ..... 82
Checking the Status of Panels (Equipment) ..... 80
Checking to see if client PCs are logged in ..... 163
Checking User In/Out Status ..... 92
Checking/Repairing database tables ..... 164
Checkpoints ..... 108
Setting up guard-tours ..... 108
Class map (for readers) ..... 241
Clear imported archive-data ..... 172
Clearing a Bad Card/PIN Global Lockout ..... 78
Client PCs ..... 284
Checking to see who is logged in ..... 163
Client/server startup issues ..... 284
Client Workstation Access and Permissions ..... 290
Client/server operation (DCOM set up) ..... 282
Client/server startup issues ..... 284
Clock (setting a panel to match the computer) ..... 74
Close
An item in the tree ..... 346
Close / Up button on the toolbar ..... 178
Command Points ..... 255
1 Define custom point type ..... 257
2 Command selections ..... 255
Comments for alarm messages ..... 43
Commissioning ..... 296
Try the configuration wizard ..... 296
Communications ..... 112, 122
Auto-connect to panel (see note under 2nd screen) ..... 114
Auto-login to Control & Status ..... 126
Host connection settings ..... 213
Panel communications log report ..... 36
Panel groups and connection settings ..... 204
PC and Panels—Modem Connections ..... 301
Serial Port / Modem Setup (Communications Software) ..... 306
Setting panel communication to auto-start ..... 122
Communications client ..... 306
Communications failure ..... 158
Users who can enter during ..... 158
Communications log (purging) ..... 174
Communications software ..... 306
Components (system introduction) ..... 2
Computer requirements ..... 272
Condo ..... 232
Suite-Security keypads ..... 232
Condominium LED keypads ..... 84
Configuration ..... 194, 232, 260
Account-Wide Panel Settings (Feature-Set¸ etc.) ..... 194
Areas and related settings ..... 222
Custom input-point types ..... 257
Doors and readers ..... 236
Elevators (lifts) and Associated readers ..... 244
Expansion modules ..... 228
Monitored conditions (Equipment settings) ..... 218
Monitored sensors (input points) ..... 252
Outputs (electronic switches) ..... 260
Panels, Panel Groups, and Connection Settings ..... 204
Reporting on Operator Audits or Panel Communications Logs ..... 36
Setting panels and groups to appear in the 'tree' ..... 354
Suite-Security keypads ..... 232
System settings for each Panel ..... 210
Understanding access-controlled areas ..... 220
Configuration updates to panels ..... 112
Conflicts
Checking for panel vs. software differences 162
Partial updates shown in Yellow/Green in user list ..... 150

Errors;Correcting software vs. panel differences;Conflicts
Correcting database....120
Connecting
A modem to a system panel....301
Auto-connect to panel (see note under 2nd screen)....114
Transmitting settings to panels....112
Connection overview....297
Connection type....204
Monitoring¸ Paging¸ & Remote Mgt. Settings....212
Panels¸ Panel Groups¸ and Connection Settings....204
Contact information for a site/account....196
Contacting VEREX Technology....357
Contacts....357
Control
Check status or control an elevator....96
Check status or control floors....98
Control & status
Login automatically....126
Control & Status....92
Activity in area....89
APB Reset....91
Area Users....89
User Count....89
User In/Out Status....92
Controlling a Pan/Tilt/Zoom Camera....57
Controlling an Area or Device....54
Controlling items....70
Using Maps and video....48
Copyrights and Trademarks....vi
Custom Information Categories for Users....148
Custom point types....257
Custom reports (custom lists of users)....34
Custom reports (database query)....328
Custom User Information....148
Customizing How Events are Displayed (Event Priority)....202
Customizing the MyTools Bar....318
Conflicts;Database
Correcting panel vs. software differences....120
Database....160
Backing up the database....166
Check for panel vs. software differences....162
Checking to see who is logged in....163
If you You Need to Transfer the database to another PC....280
Maintenance....160
Managing through SQL server....326
Partial updates shown in Yellow/Green in user list....150
Troubleshooting
Check/Repair the database....164
Database backup....166
Database query....328
Activate for a typical system....326
Date format settings....275
Daylight-Savings and Standard time
Dates for time-change....140
Synchronize panels after time-change....74
DCOM....175
DCOMCNFG....282
Dealing with alarms (Comment/Resolve)....43
Define cameras....64
Deleting....130, 136, 142, 178, 260
A panel communications session....114
An account folder....178
Areas....222
Authorities for users/entrants....142
Cardholders/entrants....150
Disabling a pseudo-point....218
Doors....236
Elevators (lifts)....244
Expansion modules....228
Holidays....140
Input-points / sensors....252
Operator permissions....130
Operators....126
Programmable output points....260
Required-attendance periods....24
Schedules....136
Users....150
Users who can enter during comms-failure....158
Department (define custom user field)....148
Desecure
Elevators....96
Floors....98
Designing printed card layout....154
Desktop....14
Changing the look of....354
Desktop reference....338
Resetting....15
Did it work (viewing the status of previous communications sessions)....118
Direct cable connection installation....300
Director-Server PC....280
Changing the MONITOR ISM Director-server PC....280
Disable cards
Card disabling reader (Card Action)....241
Disabling Pseudo-Points....218

Disarm an area ..... 86
Disclaimers ..... vi
Display offsets ..... 208
Door authorities & operation
Overview ..... 220
Door control ..... 94
Door interlock (man-trap) ..... 243
Door monitoring ..... 242
Door settings ..... 236
Door unlockings ..... 222, 239
Doors
Add a door or view/change settings ..... 236
Duplicated numbers (see display offsets) ... 208
View status or control a Reader/Door ..... 94
Doors, Readers, and Related Settings ..... 236
Duplicated item numbers (see display offsets) 208
Duress
PIN requirements (see note under 'PIN') .... 150
Duress (enabling) ..... 194
Early departure report ..... 20
Elevator (lift) settings (configuration) ..... 244
Elevator control ..... 96
Elevators
Add new or view/change settings (configuration) ..... 244
View status or control ..... 96
Elevators (Lifts) and Associated Readers ..... 244
Emergency keys ..... 232, 252
Set up for a suite-security keypad ..... 232
Set up for an LCD keypad (1st 3 inputs) ..... 252
To trigger a programmable output ..... 260
To trigger a suite-security keypad output .... 232
Enable cards
Card enabling reader (Card Action) ..... 241
Enabling sounds ..... 200
Ensure Authorities Have Been Set Up for Each Account ..... 184, 185
Entering at a controlled door ..... 9
Enterprise resource management ..... 332
Automated user/card import ..... 332
Entrants / panel users ..... 150
Equipment
Checking status ..... 80
Equipment screens
Duplicated numbers (see display offsets) ... 208
Equipment Settings (Pseudo-Points) ..... 218
ERM ..... 332
Automated user/card import ..... 332
Error messages due to database damage ..... 164
Errors
Checking for panel vs. software differences/conflicts ..... 162
During a panel-update session;Don't decide now ..... 120
Partial updates shown in Yellow/Green in user list ..... 150
Escort Privilege ..... 146
Event ..... 39
Event filtering for operators ..... 42, 134
Event instructions ..... 198
Event log (purging) ..... 174
Event priorities ..... 202
Event Responses ..... 197
Event Responses for Acknowledging Alarms .. 197
Events ..... 39, 200
Enabling sounds ..... 200
Events pertaining to an account ..... 26
Event-triggered cameras ..... 69
Exiting at a controlled door ..... 9
Exiting from the software ..... 12
Expansion Modules and related settings ..... 228
Export / archive data ..... 172
Extended point-type ..... 257
Set up custom point type ..... 257
Fall-back users (can enter during comms failure) ..... 158
False Alarms ..... 18
Favorites (MyTools) ..... 349
Feature set ..... 194
For shared users ..... 184
Features
Adding ..... 286
Filter on column ..... 151, 352
Find / select a system panel ..... 354
Floor control ..... 98
Floors
Control all floors for a specific elevator ..... 96
View status or control ..... 98
Folders for accounts ..... 178
Forms view ..... 350
Full screen (maximizing a window) ..... 14
Function key operation ..... 260
Garage/extended point type ..... 257
Set up custom point type ..... 257
Global lockout ..... 78, 196
Clearing ..... 78
Global Panel Settings ..... 194
Glossary (system / hardware reference) ..... 335
Grant last user (look for the door commands) ... 54
Grid view ..... 352
Group (panel group/location) ..... 204
Grouping items by location (setting up Areas) 222
Groups
Setting up panel groups ..... 204

Guard tours
Setting up guard tour input points ..... 257
Starting and monitoring ..... 106
Guard Tours ..... 104
Guard-Tours
Guard tour ..... 104
Initial setup ..... 108
Reporting on Previous Guard-Tours ..... 30
Hardware activation key ..... 286
Hardware key ..... 320
Hardware reference/glossary ..... 335
Help ..... 296
Try the helpful Wizard ..... 296
Holidays ..... 140
Assign Groups of Shared Holidays to Accounts (Shared Holiday Management) ..... 193
Holidays shared across multiple accounts ..... 189, 191
Host address (see Serial Number) ..... 213
ID and Name (under Panel Information) ..... 354
ID+PIN digits (per feature-set selection) ..... 194
If a panel is replaced ..... 208
If You Need to Transfer the database to another PC ..... 280
Image format/quality for a camera ..... 59
Image quality ..... 60
Import archived data ..... 172
Import User ..... 334
Importing or Exporting Activity or Audit Logs (Archive) ..... 172
In/Out status reports ..... 20
Information on products ..... 357
Initial Set Up of
Views, Maps, Cameras ..... 62
Input points ..... 252, 256, 257
Check status of input points ..... 100
Duplicated numbers (see display offsets) ... 208
Input points (Monitored Sensors) ..... 252
Input Points—Custom Point Types ..... 257
Input Points—Pre-Defined Sensor Types ..... 256
Inputs
Setting up Input Points ..... 252
Installation sheets ..... 357
Installing ..... 272
The MONITOR ISM Director software ..... 272
Interface ..... 14, 338
Interlock (man-trap) ..... 243
Introduction to security management ..... 2
Invalid card/PIN tracking ..... 196
Invalid On ..... 153
IP connections ..... 298
Item numbers ..... 208
Items to appear in the MyTools bar ..... 318
Jet4 ..... 175
Key (software activation key) ..... 320
Keyswitch for area arm-disarm (setting up custom point-types) ..... 257
Language ..... 150
For this software ..... 126
For user prompts (LCD keypads) ..... 150
Large Systems--Checking for Software vs. Panel Differences / Conflicts ..... 162
Late arrival reports ..... 20
License
Activating or Updating Your Software Licensing ..... 286
License key not found! ..... 284
Licensing ..... 320
Lift (elevator)
Add new or view/change settings (configuration) ..... 244
Location of a site ..... 196
Location of items (setting up areas) ..... 222
Lock a door manually ..... 94
Logging off ..... 12
Logical tree view ..... 354
Login ..... 10
Login automatically to control & status ..... 126
Logins (user)
For database access using SQL server ..... 326
Logoff ..... 12
Logon ..... 10
Mailing address ..... 196
Main panel
System settings for each panel ..... 210
Main Panels ..... 208
Main screen (desktop) ..... 14
Maintaining the database ..... 160
Maintenance ..... 175
Windows Maintenance ..... 175
Man trap ..... 243
Managing Accounts and Account Folders ..... 178
Managing the database using SQL Server ..... 326
Manually Controlling an item ..... 70
Manually Importing User-Data From a Text File ..... 334
Maps ..... 62
Initial Set Up of
Views, Maps, Cameras ..... 62
Visual status and control ..... 48
Maps and Cameras (Visual Monitoring & Status/Control) ..... 48
Maps and video ..... 48
Maximize (enlarging a portion of the screen) .... 14

Maximum image size ..... 59
MDAC ..... 175
Memory model (see Feature-Set) ..... 194
Menu ..... 340
Mismatch of panel version ..... 120
Modem ..... 301
  Panel Connection Overview ..... 297
  Physical Setup of Panel Modems ..... 302
  Windows Modem Setup ..... 301
Modem connections and setup ..... 301
Modem setup (communications software) ..... 306
Modem setup under MS windows ..... 301
Modules ..... 84
  Check status ..... 82
  Check status of a Suite Security System ..... 84
  Duplicated numbers (see display offsets) ... 208
Modules and related setting ..... 228
Monitor button on the toolbar ..... 73
MONITOR ISM Director ..... 272
  Installing ..... 272
  Upgrading from an earlier version ..... 278
MONITOR ISM Director software
  Operators ..... 126
  Welcome/interface ..... 10
Monitoring ..... 134, 212
  A guard tour in progress ..... 106
  Listing only specific events/alarms ..... 42
  Monitoring Paging & Remote Mgt. Settings 212
  Remote cameras ..... 48
  Scheduled event filtering for operators ..... 134
  The system monitoring window ..... 39
  Using Maps and video ..... 48
Monitoring Paging & Remote Mgt. Settings .... 212
Monitoring settings for a door ..... 242
MSDE ..... 175
Multi-Server Login ..... 11, 181
  Logging into multiple servers ..... 11
  Viewing accounts across multiple servers .. 181
Multi-tenant ..... 232
  Suite-Security keypads ..... 232
Multi-tenant facilities ..... 150
MyTools list / bar ..... 349
  Customizing ..... 318
  If the MyTools bar appears as a small button ..... 318
New Installation? Try the Wizard ! ..... 296
New site (commissioning) ..... 296
  Try the Configuration Wizard ..... 296
No access cards (see token-format) ..... 216
Note that the time lost pseudo point has been set ..... 218
NTSC camera image format ..... 59
Number of ID+PIN Digits (per feature-set selection) ..... 194
Number of users in an area ..... 89
Numbers
  Item numbers duplicated (see display offsets) ..... 208
Offsets ..... 208
On a typical day ..... 16
Open
  A menu ..... 340
  An item in the tree ..... 346
Open database (SQL server support) ..... 325, 326
Operating system maintenance ..... 175
Operation ..... 256
  Point operation reference ..... 256
Operator
  Reporting on Operator Audits ..... 36
Operator Permissions ..... 130
Operators ..... 130, 134
  Change password for an operator ..... 128
  Permissions ..... 130
  Scheduled event filtering for operators ..... 134
  Switching to a new operator ..... 12
Operators (People who can use this software) 126
Options (from the Tools menu) ..... 60, 122
  Panel Communications (Prompt to Autostart...) ..... 122
  Visual Director (camera settings) ..... 60
Other Desktop Choices ..... 354
Outputs ..... 102, 260
  Configuring ..... 260
  Status & Control ..... 102
Outputs (bCAPL)
  Duplicated numbers (see display offsets) ... 208
Overview of tasks (what is done from where) ... 17
Paging ..... 212
Paging feature ..... 260
Pal camera image format ..... 59
Panel clock (resetting) ..... 74
Panel communications
  Panel communications log report ..... 36
Panel Communications
  Auto-connect to panel (see note under 2nd screen) ..... 114
Panel Communications and Updates ..... 112
Panel configuration reports ..... 34
Panel connection choices ..... 335
Panel Connection Overview ..... 297
Panel groups
  Selection not available (greyed-out) ..... 354
  Set panels/groups to appear in the tree or on forms ..... 354

Panel Groups
Panel Groups and Connection Settings .....204
Panel Groups and Connection Settings .....204
Panel groups not listed .....354
Panel Information .....194, 354
Panel modem Setup Requirements .....302
Panel serial number .....213
Panel time zone .....204
Panel to modem connection .....301
Panel to PC via IP (LAN/WAN) .....298
Panel updates .....112
Panel version mismatch .....120
Panel vs. software conflicts .....162
Panels .....194
Account-Wide Panel Settings (Feature-Set, etc.) .....194
Add or set up .....208
Check status .....80
Define/setup .....208
Find/select .....354
Selection not available (greyed-out) .....354
Set panels/groups to appear in the tree or on forms .....354
System Panels and Displayed Item-Numbers .....208
System settings for each panel .....210
Panels not listed .....354
Panels, Panel Groups, and Connection Settings .....204
Panic keys .....232, 252
Set up for a suite-security keypad .....232
Set up for an LCD keypad (1st 3 inputs) .....252
To trigger a programmable output .....260
To trigger a suite-security keypad output .....232
Password .....160
Maintenance issues .....160
Password (changing for an operator) .....128
Password and Personal ID Number Issues .....160
PC and Panels—Modem Connections .....301
PC Client .....290
PC Client Access (Allowable Client List) .....290
PC Client Permissions .....294
PC Issues and Software Installation .....272
PC requirements .....272
PC to system panel connection
Multi-panel or far from PC .....299
Single-panel or close to PC .....299
PC to system panel connection (RS232) .....299
PC to system panel connection (RS485) .....299
PCF (card format) settings .....216
Perimeter (points) .....252, 257
Permissions .....294
Operator permissions .....130
PC Client Permissions .....294
Personnel management .....332
Automated user/card import .....332
Photo badging option (using) .....154
Photos (capturing) .....154
Photo-verification .....44
Physical Setup of Panel Modems .....302
PIN for service technician .....196
PODs
Check status .....82
PODs (expansion modules) .....228
PODs (modules)
Duplicated numbers (see display offsets) .....208
Point Custom Types .....257
Point operation reference .....256
Points .....252, 256, 257
Check status of input points .....100
Port (serial port setup) .....306
Position (define custom user field) .....148
Printing
An activity report .....26
Printing reports after viewing them .....38
System/device settings etc. .....34
Printing cards with user photo .....154
Product information .....357
Programmable Outputs .....260
Programming .....112
Updating panels with changes .....112
Prompt to AutoStart Communication to the Panel .....122
Protecting against data loss .....166
Pseudo points .....218
Pseudos
Check status .....80
PTZ cameras .....57, 64
Aiming or zooming .....57
Initial set up .....64
Purge .....174
Purging Activity or Audit Logs .....174
Purging MONITOR ISM Director Logs .....174
Quality .....60
Quality of a camera-image .....59
Query .....328
Reader 1 & 2 Settings for a Door .....240
Reader settings .....240
Readers
In elevator (lift) cabs .....244
Reference
Desktop .....338
System / hardware reference .....335
System capacities .....320

Registration
Software licensing and registration ..... 286
Deleting old Activity or Audit Logs (Purge)..... 174
Renaming ..... 178
An account ..... 178
An account folder ..... 178
Repairing database tables ..... 164
Replacing a main panel ..... 208
Report ..... 36
Also see Reports ..... 20
Creating custom queries and reports ..... 328
Import archived data to report on ..... 172
Reporting ..... 36
Also see Reports ..... 20
Creating custom queries and reports ..... 328
Import archived data to report on ..... 172
Reporting on Operator Audits or Panel Communications Logs ..... 36
Reporting on Previous Guard Tours ..... 30
Reporting on User Access Rights (by Area¸ Door¸ or Floor) ..... 32
Reports ..... 20, 32, 36, 328
Absentee ..... 20
Activity reports ..... 26
Arrival/Departure ..... 20
Creating custom queries and reports ..... 328
Early departure report ..... 20
Guard tour report ..... 30
Import archived data to report on ..... 172
In/Out Status ..... 20
Late arrival report ..... 20
Printing or viewing sorted lists of users ..... 34
Printing or viewing system/device settings & users etc. ..... 34
Roll call ..... 20
Time and attendance
Setting up required-attendance time periods ..... 24
Time and Attendance (absent¸ late¸ roll-call¸ etc.) ..... 20
Totalization report ..... 20
User-access (by Area¸ Door¸ or Floor) ..... 32
Viewing (or viewing and printing) ..... 38
Request to Exit ..... 242
Required attendance zone ..... 240
Reserve authority ranges for shared users ..... 187
Reserve holiday ranges for shared holidays ..... 189
Reserve user ranges for shared users ..... 188
Reset button ..... 15
Reset User Count ..... 90
Resetting APB tracking for an area ..... 91
Resetting the Antipassback Status for Users in a Specific Area ..... 91
Resetting the desktop ..... 15
Resetting the User-Count for an Area ..... 90
Resetting Users' Antipassback Status ..... 76
Resolve an alarm message ..... 43
Restore ..... 170
Restoring the database ..... 170
Restoring the Database ..... 166
Reverting to an earlier copy of the database ..... 170
Roll call reports ..... 20
Roll-call reports ..... 20
RS-232 ..... 299
RS-485 ..... 299
RTE ..... 242
Scheduled Event Filtering for Operators ..... 134
Schedules for User Access and Area Automation ..... 136
Screen ..... 338
Secure (re-secure)
Elevators ..... 96
Floors ..... 98
Security management ..... 2
Select
Find/select a system panel ..... 354
Selecting a server during login ..... 10
Serial cable connection support ..... 300
Serial cable wiring ..... 299
Multi-panel or far from PC ..... 299
Single-panel or close to PC ..... 299
Serial cable wiring (RS485) ..... 299
Serial number ..... 213
Serial Port / Modem Setup (Communications Software) ..... 306
Serial port requirements ..... 274
Serial port setup ..... 306
Serial ports ..... 274
Server ..... 10, 290
Client / Server setup ..... 290
Selecting during login ..... 10
Server location ..... 10
Servers ..... 181
Viewing accounts across multiple servers ..... 181
Service packs ..... 175
Service PIN ..... 160, 196
Maintenance issues ..... 160
Set the Panel Date/Time¸ Reset APB for Users¸ or Clear a Global Lockout ..... 74
Set up maps and views ..... 62
Setting Communications to Auto-Start when an Operator Logs In ..... 122

Setting How Panels and Groups are displayed ..... 354
Setting the Maximum Camera-Image Size..... 59
Setting the Panel Service PIN for this Account 196
Setting up (configuring) guard-tours..... 108
Setting up a new system..... 296
Try the Configuration Wizard ..... 296
Setting up Panel Groups..... 204
Setting up required-attendance time periods .... 24
Setting up Shared Holidays (and/or Time-Change Dates) ..... 191
Setting up Shared Users..... 190
Settings..... 290
For client / server operation ..... 290
System settings for each main panel ..... 210
Settings Needed under ..... 184
Setup
The communications software ..... 306
Setup panel modem..... 302
Shared Groups
1A - Settings Needed under..... 184
1B - Ensure Authorities Have Been Set up for Each Account..... 184
1C - Ensure Authorities Have Been Set up for Each Account..... 185
2A - Set Up Shared User-Setting Groups ... 186
2B - Reserve Authority ID#s (Shared Authority Groups)..... 187
2C - Reserve User ID#s (Shared User-Groups) ..... 188
2D - Reserve Holiday ID#s (Shared Holiday Groups)..... 189
3A - Setting up Shared Users ..... 190
3B - Defining groups of shared holidays ..... 191
4A - Assign Groups of Shared Users to Accounts (Shared User Management).... 192
4B - Assign Groups of Shared Holidays to Accounts (Shared Holiday Management) 193
Shared Holiday Management..... 193
Shared holidays ..... 191
Assign Groups of Shared Holidays to Accounts (Shared Holiday Management) ..... 193
Shared User Management..... 192
Shared users..... 190
Assign Groups of Shared Users to Accounts (Shared User Management)..... 192
Shared Users
Feature set supported..... 184
Shortcuts (MyTools)..... 349
Show Panel/Panel Group Information..... 354
Showing / hiding panel & panel group ID ..... 354
Shutting down the communications software .. 306
Shutting down the software ..... 12
Signature..... 154
Create or link to user form..... 154
Signing in ..... 10
Single-panel installation
Auto-connect to panel (see note under 2nd screen) ..... 114
SIP reporting ..... 298
Siren..... 232, 252
Checking status for the system or various items..... 70
Set up a programmable output for this ..... 260
Set up for a suite-security keypad ..... 232
Siren duration for a suite-security keypad ... 232
System siren duration..... 210
To be triggered by a custom input-point type ..... 257
To be triggered by a pseudo/equipment condition..... 218
To be triggered by an emergency key (1st 3 inputs on an LCD keypad)..... 252
To be triggered by an external sensor (input point) ..... 252
Software..... 272
Installing MONITOR ISM Director ..... 272
Upgrading from an earlier version ..... 278
Software Activation and Licensing ..... 286
Software activation key ..... 286
Software Installation..... 272
Software installation for a Fresh/New System . 276
Software key ..... 320
Software license
Activating or Updating ..... 286
Software licensing and activation key..... 320
Software operators..... 126
Software version & capacities (activation key) 286
Sorting a large account-list..... 178
Sound..... 200
Enabling for events..... 200
Sounds..... 200
Enabling for events..... 200
SQL server..... 175
SQL Server
Managing the database using ..... 326
SQL server support..... 325
Standard time and Daylight-Savings
Dates for time-change..... 140
Synchronize panels after time-change ..... 74
Starting a guard tour..... 106
Starting the communications software..... 306
Startup..... 284
Client/server startup issues ..... 284

Start-up and Logging In ..... 10
Stations ..... 108
  Setting up guard tours ..... 108
Status ..... 92, 102
  Check status or control elevators ..... 96
  Check status or control floors ..... 98
  Checking for the system or various items ..... 70
  Checking status by area ..... 86
  Checking status of a Suite Security System . 84
  Checking status of doors ..... 94
  Checking status of expansion modules ..... 82
  Checking status of input points ..... 100
  Checking status of system/equipment conditions ..... 80
  Login automatically to control & status ..... 126
  Outputs ..... 102
  User In/Out Status ..... 92
  Using Maps and video ..... 48
Status & Control
  Area Users (activity¸ user count¸ APB reset) 89
Status bar ..... 345
Status toolbar ..... 72
Suite security keypad ..... 84
  Check status ..... 84
Suite-security keypads ..... 194
  Missing from in the 'tree' (see Feature-Set) 194
Suite-security Keypads
  Duplicated numbers (see display offsets) ... 208
Suite-Security Keypads and Related Settings 232
support.verextech.com ..... 357
System
  Check status ..... 80
System / Hardware Reference ..... 335
System capacities ..... 320
System Card-Access Settings ..... 216
System communications settings ..... 212
System components ..... 2
System design ..... 335
System introduction ..... 2
System Maintenance Tasks ..... 160
System Management Primer ..... 16
System Monitoring ..... 39
System panel to modem connection ..... 301
System Panels ..... 208
System Panels and Displayed Item-Numbers. 208
System screens
  Duplicated numbers (see display offsets) ... 208
System settings for each Panel ..... 210
System-Wide Security Settings ..... 210
Tables ..... 352
Tasks (what is done from where) ..... 17
Technical bulletins ..... 357
Technical Support ..... 357
The Photo-Badging Option ..... 154
There is no communication client running now ..... 112, 306
Time and Attendance Reporting ..... 20
Time lost pseudo point ..... 218
Time zone for a panel ..... 204
Toolbar ..... 72, 343
  Status toolbar ..... 72
Tools, ⇨Options ..... 122
  Prompt to AutoStart Communication to the Panel ..... 122
Tools-Options ..... 60
  Adjusting Camera Quality for Your Connection/Bandwidth ..... 60
Topology ..... 335
Totalization reports ..... 20
Tour ..... 108
  Guard Tours ..... 104
  Setting up (configuring) guard-tours ..... 108
Trademarks and copyrights ..... vi
Tree area ..... 346
Tree view
  Setting how panels and groups are displayed ..... 354
Trouble
  Checking status for the system or various items ..... 70
Troubleshooting
  Duplication of item numbers (see display offsets) ..... 208
Typical day ..... 16
UID (see Panel Code) ..... 212
Understanding Access-Controlled Areas ..... 220
Understanding Accounts and Account Folders 178
Unlock a door manually ..... 94
Unlock doors automatically ..... 222, 239
Unlocking ..... 94, 239
  Unlock doors automatically ..... 222, 239
Unwanted alarms (blocking 'pseudos') ..... 218
Up / Close button on the toolbar ..... 178
Update panels ..... 112
Upgrading from an earlier version of Software 278
Upgrading your software license ..... 286
User access reporting ..... 32
User authorities ..... 142
User count ..... 89
  Resetting for an area ..... 90
User import (automated) ..... 332
User In/Out status ..... 92
User information categories ..... 148
User lockout ..... 78

Clearing....78
User logins....326
User photo....154
User settings (under Shared Groups)....186
User signature....154
User-defined fields....148
User-photo verification....44
Users....89, 92, 150
Add or view/change settings....150
Area Users (Activity, User Count, and APB-Reset)....89
Assign Groups of Shared Users to Accounts (Shared User Management)....192
Custom Information Categories for Users....148
ID# Reservations for shared users....188
Printing or viewing sorted lists of users....34
Reset APB by area....91
Resetting APB status....76
User In/Out status....92
Who can enter during comms failure....158
Users (importing external data)....334
Users / Entrants....142, 150
Users and Holidays Shared Across Multiple Accounts....183
Users shared across multiple accounts....190
Using this Guide....vi
Vault/safe inputs (setting up custom point types)....257
VEREX Technology on the Web....357
Verify users (photo verification)....44
Version mismatch (panel)....120
Video
Monitoring remote cameras....48
Video tools....56
Viewing (or printing) reports....38
Viewing accounts across multiple servers....181
Viewing and Sorting a List of Users....150
Viewing system activity....39
Viewing the Status of Previous Communications Sessions....118
Views....62, 328
Activating views (for DB query)....326
Initial Set Up of Views, Maps, Cameras....62
Visual status and control....48
Virus protection....175
Visitor (Escort Required)....146
Visual Director (Maps and Video)....48, 62
Visually Verifying Users (Photo-Verification)....44
Wandering patient....243
Welcome to the MONITOR ISM Director software....10
What can be done from where....16
What happened (viewing the status of previous communications sessions)....118
What is done from where....17
Who entered (photo verification)....44
Who is logged in....163
Who went where and when....26
Why isn't an item available (operator assignments)....126
Windows 2000/XP Authorities....275
Windows Direct-Cable-Connection Setup....300
Windows Maintenance....175
Windows modem setup....301
Wizard....296
Try out the Wizard....296
Work late
Setting up work-late input points....257
Working with Accounts and Folders....178
Worklate....86
www.verextech.com....357
Y2K (Year-2000 compliance)....275
Set the short-date format....275
Zoom or aim a PTZ camera....57